

УНИВЕРСИТЕТСКИ
ЧЕТЕНИЯ
И ИЗСЛЕДВАНИЯ
ПО БЪЛГАРСКА
ИСТОРИЯ

IV МЕЖДУНАРОДЕН СЕМИНАР
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ROMAN PROVINCE THRACE IN "ARMENIAN HISTORY" BY MOSES OF CHORENE

NEBOJŠA OZIMIĆ (NIŠ, SERBIA)

A very few part of Balkan Peninsula had that strategic importance for several dozen centuries, as Thrace used to be. Different political and religions interests were interlacing in it, depend on time of its events and there was no period without events in that area usually considered of Danube in north up to Constantinople in south.

Strategic importance of Thrace additionally emphasized the Danube valley and Black sea coast. There were no antic writer who has not give data on Thrace – Herodot, Strabon, Plinius Junior, Dion Kassius, Arrian, Xenophont... are just few names which had perpetuate events in Thrace and Thrace itself from their point to view. It was exceptionally interesting for us, to see how Thrace was written about by somebody who had lived across the Black Sea and had different interests unlike their precursors. So, we had chosen Moses of Chorene who was born in 370. AC in Chorene, Armenia.

Moses of Chorene also known as "the father of Armenian literature"¹ earned his broad education after basic level in all larger cultural centers. So, he had lived in Edesa (Mesopotamia), Jerusalem, Antioch, Rome, Athens and Constantinople.

It is needed to emphasize that he improved the knowledge of Greek literature an also have been known for its knowledge.

He spends time in Constantinople until 434. when he decided to return to native Armenia which just had achieved in 442. After he was ordained for bishop in Armenia, he also became parish archive custodian and as a linguist collaborated in translation of the Old Testament.

It is needed to mention he had started to write the history of Armenia the very same year he returned to Armenia (442), and he covered the events up to 441. year. There are opinions, although isolated, Moses of Chorene was one of the most educated man of its time². The exact year of his death is unknown, but two years are speculated: with 487. in reference to 492.

On the basis of certain anachronisms, newer historiography has determined the history of Armenia has been in writing up to 9th century³ which doesn't reduce its significance concerned narrative about Armenian data in which it is very clear and precise. There are a several facts of this literary work connected in one way or another to Thrace and we are going to focus on those facts.

We find a very interesting fact in second book of history of Armenia when Moses writes: "on the days of Arshak"⁴, great intrigues appeared at the bottom of

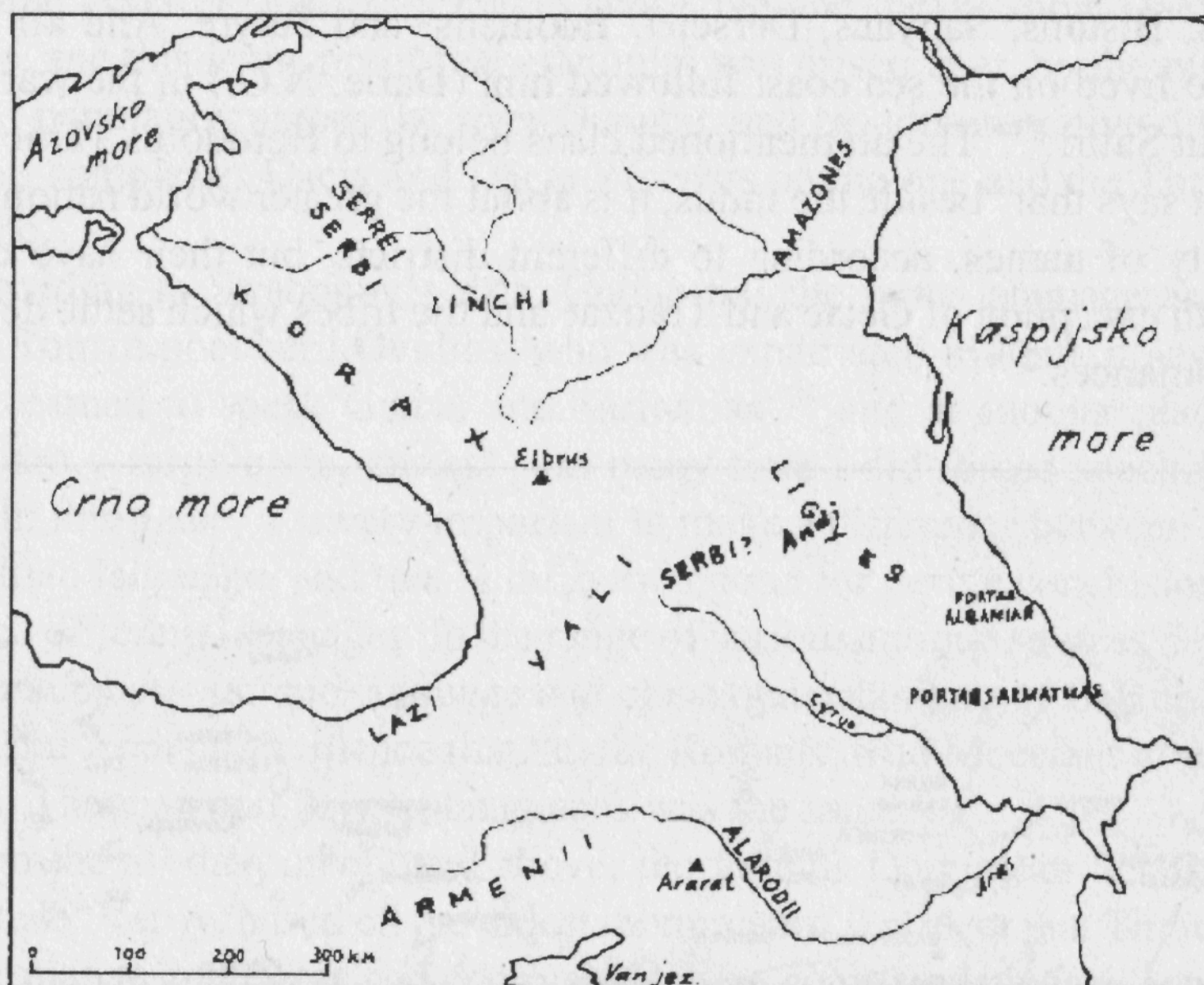
large Caucus forest⁵, in the land of Bulgarians; many of them separated and joined our side and settled for a long period of time at the bottom of Kola⁶, on fruitful ground, in the places full of bread.⁷”

With regard to Moses previously at one point mentions certain Bulgarian by his name Bunda⁸, at the same area (region below Caucus beside Black sea), who leaded a group of his fellow tribesmen to Metsamor, where they get a land and also a collective name Vanande⁹, it can be said it is first testimony, to our knowledge, about colonization of the Black sea coast from its east side by certain Armenian source. Two facts are attracted special attention: terms “Bulgarian Vehndur Vund” and “the land of Bulgarians” both used by Moses of Chorene.

It is very possible to term “Vrlndur” designations a title very similar to Mongol *bagatur* or Russian *богатырь* which marks a tribe ruler. There is also a presumption *Vund* is the Bulgaria tribe’s name among tribes mentioned in Armenia’s “Geography of VII century” as a *olkontor*¹⁰. From the point of today’s knowledge, it is assumed we are here dealing with Volsh Bulgarians which have settled upper basin of Kura river at first, than later, after they’ve got land the most likely in permanent ownership, have been assimilated and proof for that claim is their name (Venande). Naturally, all of this happens during the reign of Vaharshaks. Moses of Chorene also claims “up today” (until his time and that would be 5th century) they are called by names of their brothers and descendants – Venda¹¹. Under his son Arhak I, therefore in period between II and I century BC, certain group of Bulgarians set out by the Kura river, the most probably around river basin into Caspian lake (“and they settled for a long period of time down of Kolo, on the fruitful land, full of bread”)¹². On the news, German scientist Neumann¹³, based on mention of Bulgarians, Bulkars and their leader Vunda/Venda, thought it can be spoken of historic existence of Slavs Bulgarians since 2nd century BC. This thesis was supported by Moses himself claimed in their names there was no sense of Armenian language¹⁴ as well as a fact that Ptolemy¹⁵ and Pliny¹⁶ had registered the tribes of Serbi and Serrei in this areas, what is certainly according to other antique sources, strongly pointed to Vends, Vunds to Slavs close Serbs entity equality. As this subject requires an extra and new viewpoint of this problem, we shall not discuss it any further.

For this study, it is far more interesting fact Moses claims almost as an unimportant one and concerned with conflict between Abgar and Irod. Here is how Moses describes it:

“Abgar¹⁷ couldn’t protest new taxes. There has been a census conducted in Armenia. As he felt Rome support, Irod asked for his portrait to be placed in Armenian’s temples as well, among Roman emperor’s¹⁸ portraits and the Armenian czar’s¹⁹ portrait. That demand caused stormy Armenian people’s reaction. At that time, Irod was supposed to lead army versus Thrace and German army to devastate Persian country²⁰. Irod have changed his itinerary since Abgar didn’t let



Reconstruction of Serbs by Pliny and Ptolomy

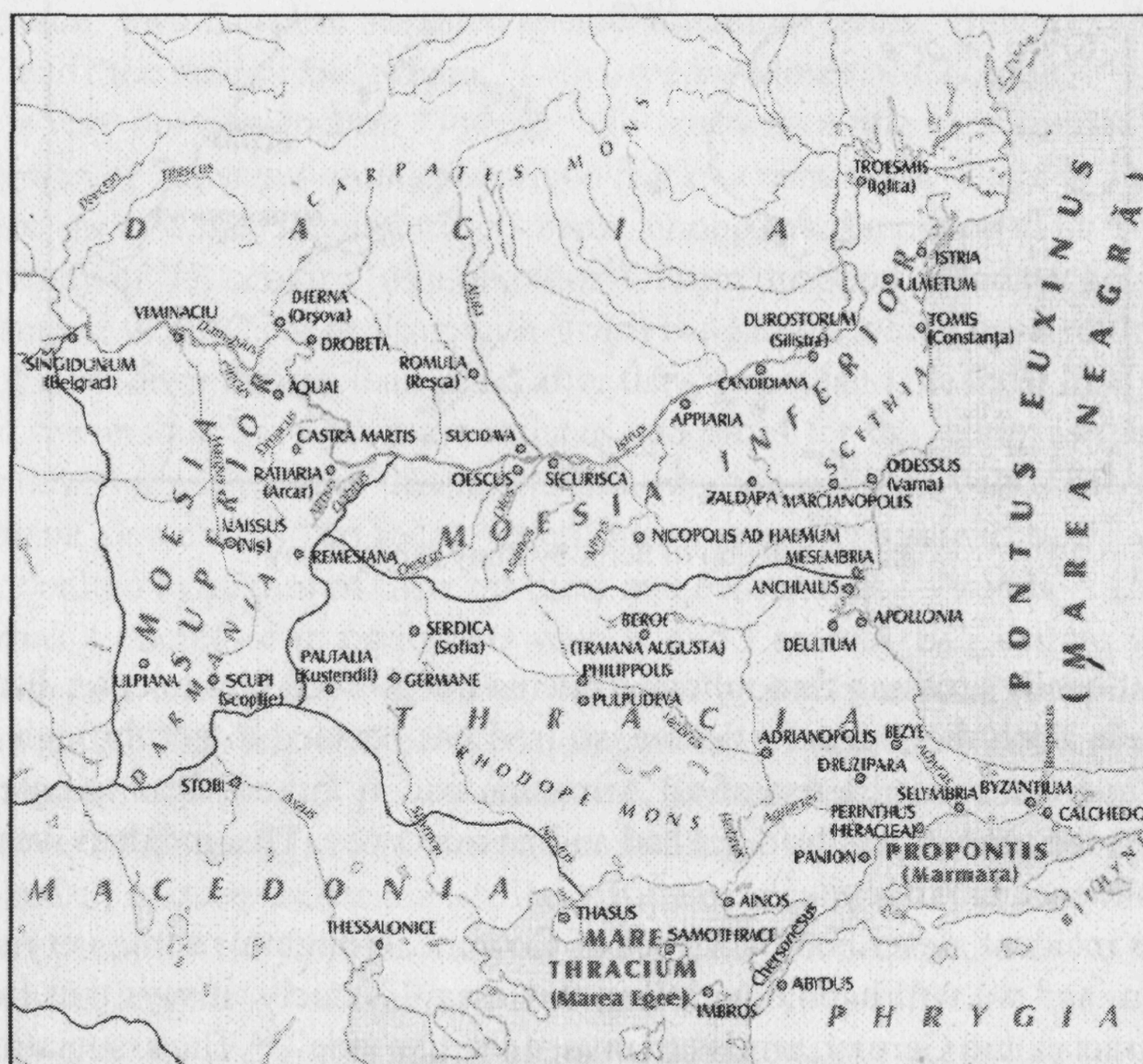
him additionally crossing throughout Armenia but pointed him to enter Persia by desert side, upon the August's decree, so Irod has decided to get through Abgar country and that caused a rise of all Armenian nation forbade Irod to enter their region. At the time of this Irod get bad and passed away. This incident weakened Rome influence in Armenia.²¹

This incident, described by Moses of Chorene, brought us some very special cognition, and we will handle with it in this essay. Namely, it says that Irod did sent "Thracian and German armies to ravage Persian side".²² The association between Thracians and Germans in these areas is the anachronism by itself because the very first German's settlers were noticed in this region three-four centuries afterwards.

As Moses had procreated and lived in Chorene, it was possible that he considered some other clan arrived over the Thrace and the Black sea coast like a Germans. The question is: what Thracian army is about with Irod going to invade Armenia, and we will consider that question in further course of this essay.

It is clear that the term *Thracian army* means an army which composed by people from Thrace. But, Thrace was full of many different clans, and it will be very interesting to find out which clan or which clan's members are about. The clans which were described by Herodot like these involved in Dary's forays (because of political obligation, or geographic location) are following: "Petians,

Kikonians, Bistons, Sapyans, Dersejci, Edonians, and Satyre. And all of them those were lived on the sea coast followed him (Darie, N.O.) in the war (...) all of them but Satiri.²³” The all mentioned clans belong to Herodotus Thracians and for these it says that “beside the Indus, it is about the greater world nation ... They have plenty of names, according to different districts, but their have common habits, with exception of Getae and Trauzae and the tribes which settle down over the Krestoniances.²⁴”



Our opinion is that this citation is the key for identifying the Germans mentioned by Moses. The biggest encyclopedist from the 6th century, Isidor Bishop of Seville, in his capital work “Etymology” it says that Getae is the very first name for the Goths tribe.²⁵ Getae which were dwelt area southward from Danube until northwest part of Carpati, were forebears of Goths and they were considered as Dachians. So, G.Soturif says that some briefs instigated Getae as a Dachians, and some as a Goths.²⁶ We shell try to identify the origin of Moses’s Germans i.e. Getae/Goths by achieving conceivably sense about who were clan members which were ran to help Irod. The fact that several antique authors were placing Thracians in the same family tree with the Illyrians, Sarmatians, Scitians, and Dalmatians,

established by Jafet²⁷ perfectly makes sense. No one speaks about Dacians regarding this, and this is the proof that ethnonim was arisen later, by the migration of Thrace's population across the river Danube, and by administrative division into separated complexes Dacia and Dacia Ripensis on the one and the Thrace on the other side.

According to Strabonov's data, Getian has the same language as the Thracians.²⁸ Roman poet/bard Ovidius, who was expatriated in Pont, it says: "I have already learned to speak Getian and Sarmatian"²⁹ and at another place: "I as a roman bard – forgive me, muses! – as many time I did forced speaking Sarmatian."³⁰ In this place, it is very important to make a difference between Sarmatian and Gethian language, and that is the cornerstone for derive conclusion that was about two different languages. In the range of various antique sources dealing with the same subject – unique language and close understanding of Balkan's clans, it will append Appian's evidence that "to the Romans, who Moesians considered as Illyrians, Thracian and Illyrian languages was the same."³¹

From the all data mentioned above, the famous Dominican Sebastian Dolci has written: "Verily, based on the oldest monuments, it is clear that Thracians, Illyrians, Sarmatian and Getae had common dealing, common language actually."³²



However, it's can't be said about Thraco-German army who rans to help Irod, without deeper understanding about it what entity/es was/were considered as the tribes mentioned in the work of Moses of Chorene. In any case, if we accept the possibility that was underlined by almost all ancient authors who deal with tribes of Thracia, that's the clans of Balkan Peninsula have had one single language, (with possibility of known dialect's differences), it's bringing a question: which language they used to, by itself? This will helps, probably, to reveal another piece of knowledge regarding history of Balkan Peninsula and Thrace itself as its relevant factor.

NOTES

- ¹ R. Novaković, „*More about origin of the Serbs*“, Belgrade, 1992, 32.
- ² Paul – Joseph Shaffarik, *Über die Abkunft der Slawen*, nach Lorenz Surowiecki, Ofen (Budim), 1828, 140.
- ³ R. Novaković, „*More about origin of the Serbs*“, 32.
- ⁴ Arshak I – 128. to new age. Also a founder of Arshakid dynasty.
- ⁵ This is about Partia, located on south-east Caspian sea coast with population known as Partians, one of the Iranian tribes. About 250 BC, in a battle against Seleukid state ruled mainly part of front Asia, an empire was founded by Arshak I (248–216) who has also been named Arshak the Brave by Moses of Chorene. Under one of his successor, Mitridat I (170–139) also named Arshak the Great by Moses of Chorene, Partian empire grew into huge state and squeeze Seleukids on the west to Euphrat, and on east up to India. Moses of Chorene frequently names Partian state as Persia.
- ⁶ This is about fruitful plain around Caucous sea.
- ⁷ Моисей Хоренский, *История Армении*, 1–4, (Reprint edition 1830 г.) Ереван. : Грхери ашхар, 1990, book 2, 9 (hereinafter Моисей Хоренский, *История Армении*).
- ⁸ Моисей Хоренский, *История Армении*, 2, 6.
- ⁹ Моисей Хоренский, *История Армении*, 2, 6.
- ¹⁰ See footnot 218 previously mentioned edition “The History of Armenia”.
- ¹¹ Моисей Хоренский, *История Армении*, 2, 6.
- ¹² Моисей Хоренский, *История Армении*, 2, 9.
- ¹³ Neumann, *Geschichte der Armen. Litter.*, 1836, 589–596.
- ¹⁴ Моисей Хоренский, *История Армении*, 2, 26.
- ¹⁵ Claudius Ptolomaeios, *Cosmographia*, V, 9.
- ¹⁶ Plinii Secundi, *Naturalis historiae*, Lipsae, 1906, I, 5, 29; III, 24; VI, 19.
- ¹⁷ Abgar, Abgar Ukkama – the ruler of Syrian town Edese (ruled from year 3 to year 50, with interruptions from year 7 to year 13). Moses of Chorene calls him as Armenian czar. Interpretation of his name as *avag air* meant “older (or leading) man” belongs in series of people's etymology, very often and the most often inaccurate in study of Moses of Chorene.
- ¹⁸ Octavian August.
- ¹⁹ Моисей Хоренский, *История Армении*, 2, 26.
- ²⁰ Underlined by N.O.
- ²¹ Моисей Хоренский, *История Армении*, 2, 26.
- ²² Моисей Хоренский, *История Армении*, 2, 26, and also Josephus Flavius (Iosiphus Flavius, *Aniquitates*, XVII, 8, 3).
- ²³ Herodotus, VII, 110.

- ²⁴ Herodotus, V, 3. Underlined by N.O.
- ²⁵ Isidor, *Etymologiae*, IX. There are a many different opinions about this – Theophylactus Simocattes, when he speaks about Slavs raids on Thrace, it says “*Thrace was violently raided by Gets tribe, or similarly, Slavs horde*”, and makes explanation that the name Geti is going to be “*an old name for those barbarians (Slavs)*”. (Theoph., Hist. III, 4 p. 116).
- ²⁶ G. Sotiroff, *Elementa nova pro historia Macedono-Bulgarica*, Regina, Lynn Publishing Co., Saskatchewan, Canada, 1986.
- ²⁷ Isidor of Seville, *Chronicon* I, 6; Iosiphus Flavius, *Aniquitates*, 1, 6, 3; Мовсес Каланкатуаци, *История страны Алуанк*, I–III, I, 2.
- ²⁸ Strabo, IV, 3.
- ²⁹ Ovid., *Trist.*, V, 12, 58 (*Jam didici Getice Sarmaticeque loqui...*). Underlined by N.O.
- ³⁰ Ovid., *Trist.*, V, 7, 55–56 (*Ille ego Romanus vates – ignoscite, Musae! – Sarmatico cogor plurima more loqui.*). Underlined by N.O.
- ³¹ Appian, *Illyric war*, V, 30. Underlined by N.O.
- ³² F. Sebastiano Dolci a Ragusio, *De Illyiricae linguae vetustate et amplitudne*, Venetis, 1975, 51. Underlined by N.O.

ГРАДОУСТРОЙСТВО И АРХИТЕКТУРА НА ГЕТСКАТА СТОЛИЦА (ХЕЛИС) В ИСТОРИКО-АРХЕОЛОГИЧЕСКИЯ РЕЗЕРВАТ „СБОРЯНОВО“

ТОТКО СТОЯНОВ, ДАНИЕЛА СТОЯНОВА

Тракийският град Хелис¹ се намира в централната част на Историко-археологическия резерват „Сборяново“, в землищата на селата Свещари и Малък Поровец, на ок. 6 км северозападно от гр. Исперих, в дн. Североизточна България (обр. 1. 1)². Началото на проучванията в това средище на гетите беше поставено през 1982 г. с откриването на т.нар. Свещарска гробница („гробницата с кариатидите“) – забележителен паметник на ранноелинистическата гробнична архитектура, включен в списъка на ЮНЕСКО на защитените световни паметници на културното наследство³.

Две са основанията да представим на тази научна проява настоящия доклад. Първото е значимостта на обекта за историята на Тракия от времето на нейния културен разцвет през ранноелинистическата епоха. Проучванията на гетската столица в Сборяново през последните шест сезона (2001–2006) доведоха до сериозна промяна в представата за структурата и размерите ѝ и са провокация за поглед и под друг ъгъл на известното за другите градски центрове в Тракия от тази епоха⁴. Второто е, че още от самото начало в проучването на града участват студенти, а от 1994 г. той е учебен обект, на който студентите от специалност *Археология* в Софийския университет трупат практически знания в областта на тракийската и античната археология и култура. Някои от тях вече са членове на изследователския екип⁵.

МЕСТОПОЛОЖЕНИЕ. ГРАДОУСТРОЙСТВЕНА СТРУКТУРА – РАЗВИТИЕ, ПРОБЛЕМИ НА ИНТЕРПРЕТАЦИЯТА

Част от проблемите на интерпретацията на откритото до момента в Сборяново идват от липсата на съпоставими, проучени в сходни мащаби средищни селищни обекти в Североизточна Тракия, и в частност в дн. Североизточна България. Публикациите за укрепените селища при Шуменската крепост, Кралево, Червен и хълма Царевец не дават възможност за проследяване на еволюцията на тези селища като мащаби, структура и времето на поява, както и развитие на защитната им система⁶. Гетското селище при Сату Ноу, възникнало като важен търговско-икономически център във втората четвърт на III в. пр. Хр. на брега на Дунав, при вливането на Суха река, е проучено за съжаление с траншеи и няма по-цялостна представа за плана

POWERLESS POWER: PRINCE ALEXANDER I OF BULGARIA AND HIS POLITICAL AND MORAL RECTITUDE, 1885–1886

PHILIP SHASHKO (University of Wisconsin – Milwaukee),
TANYA D. SHASHKO (Stanford University)

At the conclusion of the last of the Russo-Turkish Wars, the San Stefano Treaty of 1878 was signed between the Russian and Ottoman empires. Among the provisions of the treaty was the recognition by the Ottomans of the creation of a large autonomous Bulgaria. However, the provisions were challenged by the Western Powers, especially by Britain and Austria. As a result, Bulgaria was divided into the Principality of Bulgaria to the north of the Balkan Mountains and Eastern Rumelia to the south. Macedonia, was left under Ottoman rule even though Treaty of San Stefano provided for its inclusion in the Bulgarian state.

With the liberation of Bulgaria in 1878 from Ottoman rule, the people looked to the future with confidence and strength. However, during the first decade after liberation, the state found itself embroiled in internal and external crises. Bulgarian political culture and society in general were marked by the failure of politicians and intellectuals to arrive at a general consensus and compromises to ensure strength in unity that was so necessary for nation-building. It is obvious that those who later on thought of and placed the inscription "*obedineniteto prvi silata*" ("Unity is Strength") on the top to the entrance to the National Assembly Building in Sofia were inspired by the spirit of the *vuzrazhdentsi* and it express a sentiment considered appropriate to its place and purpose. The motto, for sure, did not mean only the spatial unity of the Bulgarian lands but also was a positive declaration of unity among the people as a source of well-being and strength. However, disagreements over the type of the new

political system, and especially the role of parliament versus the powers of the newly appointed and then elected monarch, led to elitist politics and governing without transparency and sufficient accountability. The lack of will to together tackle contentious issues of a society that was primarily democratically predisposed led to serious political and social problems that had a direct bearing on the reign and fate of Prince Alexander I of Bulgaria (1857–1893) and the evolution of the multi-party system and democracy in the country. During the seven-year reign of Prince Alexander (1879–1886), the diverse interests, trends, misunderstandings, and divisions among politicians aggravated social divisions in the country, and increased the dissatisfaction among the people. The dissensions played a major role in the failure to introduce order and stability in the country and to overcome the direct interference of the Great Powers in Bulgaria's domestic affairs. During

Alexander's reign a number of reforms and positive measures were passed by the National Assembly and decrees by the Prince. However, many problems still persisted. The absence of a clear program in building new institutions and the lack of political leaders to act together became obstacles to the material well-being of the people and the progress of the state.

The history of the first years after the liberation of Bulgaria is generally well known. The historiography on the reign of Prince Alexander I of Bulgaria is substantial, with accounts by contemporary observers and many subsequent writings by Bulgarian, German, Russian, Italian American, and other scholars. [See, for example, Ilcho Dimitrov, *Kniazut, konstitutsiata i narodut*. Sofia: Izdatelsvo na Otechestveniya Front, 1972; Ilcho Dimtirov, *Epokha 1885: istoricheski ocherk za suedinenieto na Severna i Iuzhna Bulgariia*. Sofia: Tilia, 1995. Duncan Perry, *Stefan Stambolov and the emergence of modern Bulgaria, 1870–1895*. Durham: Duke University Press, 1993. Elena Statelova, *Diplomatsiata na Kniazhestvo Bulgariia, 1879–1886*. Sofia: Bulgarska Akademiia na Naukite, 1979.] However, as we all know, as new documents are discovered the writing of history becomes a challenging process for historians who continue to enrich the field with new sources, perspectives and interpretations of the past. The new document assessed here helps to understand Prince Alexander's view of his position and power as a young ruler in a new state.

The concept of power is diverse and has been used by individuals and states in different ways and for a variety of purposes. The emphasis in his essay is on the last two years of Prince Alexander's rule and attempts to assess the image, meaning, and reality of "power" in his life and the political and social life of Bulgaria. Since his arrival in the country, the prince felt the Bulgarian constitution was too democratic and it limited his freedom of action. The prince, educated in military schools and in the spirit of German militarism, did not like parliamentary rule and while in power he had no real intention of ruling as a constitutional monarch. This drive for more power led to conflicts with politicians at home as well as with foreign rulers. The prince was well aware that his crown and power were threatened not only by domestic opponents but also by foreigners, especially by Tsar Alexander III of Russia who was opposed to the prince and wanted Russian influence in Bulgaria to be unchallenged. Since Alexander III disliked the Prince, the latter reciprocated and by the middle 1880s the contest between them escalated to the point of mutual hatred.

The deterrence between the two monarchs that was stable for a while eventually broke down. The threat to the prince's power and even safety convinced him that he had to be careful in dealing with those he considered as opponents. The hatred of the tsar and of most Russian diplomats and the threat they represented to him, turned the prince's attention for support toward the Western Powers, especially Austria and Britain. However, when Tsar Alexander III and others questioned the very legitimacy of the prince as ruler of unified Bulgaria, the match

between the tsar and the prince ended in the loss of the latter's crown. Since the prince did not possess the experience necessary to effectively handle the issues facing him personally, his interpretations of the past. The new document assessed here helps to understand Prince Alexander's view of his position and power as a young ruler in a new state.

The two great events in the immediate history of the post liberation Bulgaria, the revolutionary merger of Northern and Southern Bulgaria, that is, the Unification of the Principality of Bulgaria with Eastern Rumelia into one integrated Bulgarian state in September 1885 and the subsequent victory of the Bulgarian army in the Serbian-Bulgarian War, should have made Prince Alexander I Battenberg the beloved hero of all Bulgarians and ought to have created a symbol of him that would live on for generations to come. However, for various reasons, this did not happen and the prince as well as the country found themselves at the crossroads. At the same time these years were distinguished by a desperate struggle by the prince, politicians and the intelligentsia to preserve the sovereignty of the state and to search for order, stability, and then, once again, for a new ruler. Prince Alexander, as it turned out, was an unsuccessful consensus-building monarch and this was the cause of many of the problems facing the new state and the primary cause for his dethronement and abdication in 1886.

Although Prince Alexander accepted and led the movement for the integration of the Principality of Bulgaria and Eastern Rumelia and victoriously led the army in the Serbian-Bulgarian War, he was nonetheless dethroned in a coup d'état led by a fractional group of officers and soldiers, was recalled and re-installed to the throne again by another group of politicians and then "voluntarily" abdicated the throne. At the aftermath of the unification and the victory over Serbia, therefore, Bulgaria's crises became a major issue in Great Power diplomacy and Bulgarian politicians had to start all over again and looked for a new ruler acceptable to the powers and to reorient their national policies and priorities.

Immediately after the abdication, the Prince was left without a throne and for all practical purposes was powerless. Nonetheless, he perceived himself as having political and moral power and believed that the rightness of principle and practices were on his side. Alexander's letter to Lady Strangford, written in French on November 17, 1886 from Darmstadt, is preserved at *The Huntington Library, Art Collections, and Botanical Gardens* located in San Marino, California. The letter measures about 4 x 7 inches and is written on both sides of the paper. On pages one and five of the recto side on upper left side leaf appears a royal crown standing on a stylized version, a logo or motif, possibly depicting or consisting of the letter **H**, probably the initial for the name of the principality and then the state of Hesse. Likely, it was a symbol to identify the princely house of the Battenbergs. On the front part of the envelope is the address: Madame la Comtesse Strangford. London. 3 Upper Brook Street. It has on it two 10 penning Deutsche Reichspost stamps and the Darmstadt seal. On the back side of the envelope in

beautiful English handwriting is written "Alexander 1st King of Bulgaria brother of Prince Henry of Battenberg." Everyone knew that Alexander was not "King of Bulgaria" but the return address was probably written by Prince Henry intended to give his brother encouragement among the English aristocrats. The back of the envelope has the same symbol of the royal crown as in the recto pages of the letter. On the back side the seal of London is visible. The letter reproduced below contains a few minor corrections, like a misspelled word or a letter the missing at the end in a word.

The aim of this essay is to examine and explain through a detailed analysis the letter Prince Alexander I of Bulgaria wrote on November 17, 1886 to Emily Anne Beaufort Smythe, better known as Viscountess or Lady Strangford (1826–1887). The letter which should be judged not by its length but by the contents. Alexander wrote to the Viscountess:

Darmstadt
le 17 Novembre '86

Profondément touché de la lettre si pleine de bonté, je Vous prie Madame la Comtesse

d'agréer mes plus vifs remerciemen[t]s. Personne a fait plus pour les Bulgares que Vous Madame et les bonnes paroles que m'avez adressé[es] ont par conséquent une double valeur pour moi. Les tristes expériences qui j'ai éprouvé n'ont pas amoindries mes sentiments envers les Bulgares.

– Je suis devenu trop bulgare, j'ai trop souffert pour eux, pour que je puisse les oublier un instant. Toute mon âme était pénétrée de cette noble tâche, que j'avais rêvé pouvoir mettre en exécution ; jour et nuit je pensais à eux – je ne vivais que pour eux : Quand Dieu m'a donné la victoire pendant la guerre – je croyais que maintenant tout est gagné ; je croyais que la guerre avait prouvé mon désintéressement et mon dévouement à leur cause, Dieu m'a fait éprouvé la plus dure des épreuves ; que j'ai perdu le trône – je ne le regrette pas – mais la *manière* comment je l'ai perdu – cela m'a brisé le cœur ; je les aimais tant les officiers, je les aimais comme les autres aiment les femmes ; de voir un, était déjà une véritable joie ; tout ce que j'avais de tendresse en moi leur appartenait.

Tous étaient mes élèves, chacun d'eux je connaissait person[n]ellement ; et ceux-mêmes, qui la veille mangeaient encore à ma table, les mêmes qui m'ont vu braver la mort pour eux – ceux-la m'ont trahis !

Les bulgares trouveront peut-être un prince plus heureux que moi, mai ils ne trouveront jamais un qui les aimera comme moi je les ai aimé[s] !

J'espère que j'aurai le grand plaisir de Vous voir Madame, quand je viendrai une fois en Angleterre ; j'ai tout à Vous raconter et l'intérêt si vif que Vous portez aux Bulgares est un trait d'union inséparable entre nous.

Recevez très-chère Comtesse l'assurance de mon plus profond dévouement
Alexandre

Translation in English

Darmstadt
The 17th of November [18]86

Madame,

Deeply moved by your very kind letter, I ask you, Madame Countess, to accept my

deepest thanks. No one has done more for the Bulgarians than you, Madame, and as a result the kind words you spoke have double significance for me. The sad experiences I endured have not diminished my feelings for the Bulgarians.

I have become too Bulgarian. I have suffered too much for them such that I cannot forget them even for an instant. All of my soul was penetrated by this noble task that I had dreamed to be able to carry out. Day and night I thought of them --I lived only for them.

When God granted me victory during the war – I thought that now all is won. I believed that the war proved the purity of my aims and my devotion to their cause, God made me experience the hardest of all ordeals. I do not regret that I lost the throne – but the *way* in which it was lost, this broke my heart.

I loved the officers so; I loved them as others love women. Simply to see one filled me with great joy. All tenderness I had in me belonged to them. All were my students; I personally knew each one of them and those who on the eve were still eating at my table, those very ones who saw me risk death for them – they betrayed me!

Perhaps the Bulgarians will find a happier prince than me, but they will never find one who will love them as I loved them. I hope that I will have the great pleasure to see you, Madame, when I come to England, as I have so much to tell you and the deep interest that you carry for the Bulgarians is a tie that binds us.

Please accept, dear Countess, the promise of my deepest devotion.

Alexander.

[Translated in English by Professor Jeffrey Merrick and Dr. Tanya D. Sahshko]

Превод на български

Дармщат
17 ноември [18]86

Госпожо,

Дълбоко трогнат от Вашето любезно писмо Ви моля, госпожо контесо, да приемете моите искрени благодарности. Никой не е сторил за българите повече от Вас, затова Вашите любезни думи имат за мен двойно по-голяма

стойност. Тъжните преживявания, които изпитах, не са помрачили чувствата ми към българите.

Аз станах твърде много българин, страдах много за тях, така че не мога да ги забравя и за миг. Цялата ми душа беше изпълнена с благородната задача, която смятах, че ще мога да осъществя. Ден и нощ мислех за тях. Аз живеях заради тях.

Когато Бог ми даде победа във войната, мислех, че съм спечелил всичко. Аз вярвах, че войната е доказала чистотата на моите намерения и предаността ми на тяхното дело. Бог ме накара да преживея най-големи изпитания. Аз не съжалявам, че загубих трона, но *начина*, по който това стана, разби сърцето.

Обичах офицерите, обичах ги, както някои обичат жените. Да ги виждам беше истинска радост за мен, цялата ми нежност им принадлежеше. Всички те бяха мои ученици, познавах лично всекиго от тях. И тези, които и в навечерието се хранеха на масата ми, тези, които бяха видели да рискувам живота си, ме предадоха.

Може би българите ще си намерят един по-щастлив княз, но никога няма да намерят такъв, който да ги обича повече от мен.

Надявам се да имам удоволствието да Ви видя, госпожо, когато дойда в Англия, защото имам много да Ви разказвам, а силният Ви интерес към българите ни свързва неразделимо.

Приемете, госпожо контесо, най-дълбоките ми почитания.

Александър

[Translated in Bulgarian by Dr. Rumen Gerov]

The purpose in this presentation is to demonstrate and assess how the Prince presented and perceived himself, his activity, and the events during the tumultuous years 1885–1886 to Viscountess Strangford. As Alexander correctly notes, the Viscountess was a great friend of the Bulgarians and in 1876 she established the Bulgarian Peasant Relief Fund and then went on to Bulgaria to personally aid the victims of the 1876 April Uprising. The role Alexander takes in this letter is to convince Lady Strangford of his personal purity and correctness in ruling Bulgaria. Although we do not know what Lady Strangford wrote in her, Alexander was greatly pleased by her “kind words” that had “double significance” for him and was thus deeply thankful to the Viscountess. Alexander praised her by rightly telling her “that no one has done more for the Bulgarians than you.” The Prince, for sure, wanted her sympathy and support and informed her that he would like to see her on his forthcoming trip to London. Lady Strangford continued to be interested in Bulgarian affairs after her mission to aid the victims of the massacres of 1876 and received members of the Bulgarian delegation to Britain who went there searching for a future prince of Bulgaria.

When the prince wrote the letter to the Viscountess she was already widely known and liked by the Bulgarians, and while he had lost the Bulgarian throne was not totally devoid of power or helpless. However, the prince must have felt the disgrace of his dethronement and abdication, and the powerlessness of the immediate position as a deposed monarch. He had, in his view, the moral power of the powerless. He believed that those who took up arms against and deposed him were both legally and morally wrong. It is out of such thinking that his powerlessness acquires some strength since he was mindful to spatially and politically keep close contact with politicians and the powerful monarchs that supported him. Alexander still had close connections with his family who encourage and assisted him in everything. During those critical two years, other princely families and politicians in Germany, Britain, Austria and elsewhere gave him aid, trying to bolster his anti Russian stand. In addition, the memory of having recently exercised power and hearing about calls for return to Bulgaria as prince gave him courage and endurance and probably made he feel that there was still, another, third chance, to the Bulgarian throne.

One of the most interesting aspects in reading this letter is that, placed in a Bulgarian and international context, Prince Alexander's perception and self-evaluation of himself is characterized by rectitude, moral integrity and self-righteousness. Alexander tries to define himself as a believer in God, a man of singular piety and virtue, faithful as prince and commander of the Bulgarian army. He claims that he has been devoted to his duties as prince, and showed affectionate loyalty, respect and love for the people. Moreover, an evaluation of the letter also indicates the way Prince Alexander imagined and (mis)represented his Bulgarian experiences immediately after he abdicated the Bulgarian throne.

Furthermore, by giving special consideration to this letter an attempt is made to discern the reasons why Alexander revealed to Lady Strangford some of his innermost thoughts and feelings. A careful reading of this document would also give rise to numerous questions about why did Alexander fail to mention events and individuals that had damaging impact on his life and rule. For example, Alexander neglected to reveal his dealings with Tsar Alexander III and his own true attitude and stand toward Russian policy in Bulgaria that most historians agree were the real reasons for his abdication. Therefore, the letter contains serious omissions, including many momentous issues related to his reign, the dethronement, and his abdication. The analysis of the letter gives some clues as to why Prince Alexander lost the Bulgarian throne and why, in the eyes of a large section of the people, he did not become the symbol that, as some commentators and scholars have observed, the prince rightfully deserved after the peaceful unification of the country and the successful war against the foreign invader.

There is no doubt that this letter was not just a usual response to Lady Strangford's letter. What prompted Alexander to write it were an urgent want and a

necessity to come to terms with his own role as ruler of Bulgaria and to present convincing evidence, as to why he was dethroned, abdicated and had to leave the country. Since a pressing state of circumstances forced him to give up the throne, he took the opportunity offered by Lady Stangford's letter to share with her "the sad experiences" endured during the last few months of his reign.

Historians agree that Alexander was unseated by a coup d'état staged by a group of displeased and disloyal officers and disorientated and dissatisfied soldiers who for a variety of reasons turned against him. However, there was more to it than what Alexander explicitly states in his letter. The prince used a metaphor to explain his own attitude toward the officers that participated in his dethronement. He stated that he "loved the officers so; I loved them as others love women." He claimed that "Simply to see one filled me with great joy." As one reads the words written by the prince, one is inclined to ask about the sincerity of such feelings: "All tenderness I had in me belonged to them." Although very few of his of his numerous correspondence and telegrams to his family and the woman he loved have been examined, it is obvious that he had greater attachment towards them and therefore, the Bulgarian officers were not his greatest love. In addition, Alexander exaggerated his contribution to the training of Bulgarian officers when he stated that "All were my students" and that he "personally knew each one of them." One could probably argue that Alexander's figure of speech, consisting in such exaggerated statements, was used to produce a strong impression on the Viscountess, it was a cry for support and was not intended to be taken too literally. It is known that among Bulgarian officers, intellectuals and politicians, even before the prince was unseated, the attitude towards the foreign 'Other' were prevalent and complex.

Although a military man, Alexander did not seriously consider the role of soldiers in society, especially how to deal with those officers who were not satisfied with the decorations and rewards that he distributed once war with Serbia was over. One can make a case that in the opinion of numerous Bulgarians, Alexander's leadership in the army and even as a ruler did not necessarily signify his internalization of the Bulgarian national ideal and that the Prince was an imperfect fit for ideals of national unity. There is evidence that the prince showed some reluctance in taking the initiative in the struggle for unification not because he did not want a greater Bulgaria but because he was concerned about the reaction of the Great Powers toward such a move and his position as a ruler. It seems that at times, Alexander could not distinguish between the personal and the political in his activity and that caused problems for those who worked with him.

Prince Alexander declares that even though he had "sad experiences" during his rule of Bulgaria, his feelings for the Bulgarians did not diminish. To the contrary, "I have become too Bulgarian," he wrote to Lady Strangford. This self-representation is a very serious statement that needs some

comment. Did the prince become “too Bulgarian” because he had accepted and identified with the Bulgarian way of life? Did he, in such a short period of time accept a Bulgarian identity or he “suffered too much for them” because he wanted to keep his throne? Was his assertion that he “cannot forget them even for an instant” a way of saying “I want to rule Bulgaria again”? Was his aim as ruler, “the noble task that I have dreamed to be able to carry out” a search to become true Bulgarian or to establish his own dynasty? And, although he sees himself as the honest man who “day and night I thought of them – I lived for them,” when he made the mistake of his life and accepted Tsar Alexander III urging to give up his throne and most Bulgarian leaders asked him to stay on, at that historic moment he decide to abdicate. Did he do this for his own survival or for the preservation of Bulgarian independence? These, and other questions and are not really answered by this letter. What is more serious is why the prince failed to even mention important event connected with his situation that blended heroic, tragic and even comic elements.

Furthermore, Alexander believed that “when God granted me victory during the war – I thought that now all is won.” Did he really think that the poor peasant who came from the four corners of the country to defend their fatherland made the journey and sacrifices for him? It was the Bulgarian officers and soldiers, educated and trained by Russians, who won the battle at Slivnitsa. **He concludes that his leadership in the war “proved the purity of my aims and devotion to their cause.”** Although he makes a strong case to identify with the Bulgarians, was “*leur cause*” just a Freudian slip, an unintentional mistake that seems to reveal his subconscious intention or how and what, at times, he thought and felt about his second homeland and the people he ruled.

The prince also claims that “I do not regret that I lost the throne – but the way in which it was lost, this broke my heart.” Alexander underlined “the way” to emphasize the officers’ coup d’etat and his dethronement by force of arms. Here too, we see the prince somehow begs the real question. The dethronement was a terrible ordeal for him but the abdication which came only days later after his return to power, was his choice and mistake. When Alexander stepped on Bulgarian soil after his unseating by the officers, Stefan Stambolov, the leader of the National Assembly and for all practical purposes had taken over the Bulgarian Government, address the prince: “Herewith I had over the reins of Government to you and beg you of you to save our Fatherland. The people are on your side, they love and honour and are ready at all times to die for you.” [Cited in Corti, Alexander von Battenberg, 237.] Alexander did not know how to proceed at this moment. In the confusion created by the news that Tsar Alexander was sending Prince Dolgoruki to rule Bulgaria, the somewhat friendly attitude of the Russian Consul in Russe, and that fact that conditions in the coun-

try were still not settled, the prince decide to send a telegram to the Tsar to avoid Russian intervention and to ask for reconciliation.

Prince Alexander wrote to the Tsar: "I should be happy to give Your Majesty the final proof of the unchanging devotion which I feel for Your Majesty's illustrious person. As Russia gave me my Crown I am prepared to give it back into the hands of its Sovereign." As Corti and others wrote, this "last sentence was fatal" for the prince. While Alexander went on trying to re-assert his power, the Tsar's response came: "I have received Your Highness's telegram. I cannot countenance your return to Bulgaria as I foresee the disastrous results it entails for that sorely tried country. ...Your Highness will appreciate what you have to do, I will reserve judgment about it in respectful memory of my father and in the interests of Russia and of peace in the East." [Corti, Alexander, 239-240.] As Price Alexander of Hesse, the father of the Bulgarian Prince wrote to his son, that "This incident certainly brings out in strong relief your true character to the disadvantage of that all-powerful Emperor, but it was a political error which will be exploited to your disadvantage all over Europe...You have cast your pearls before swine." This is a mistake also in that the prince usually consulted his father in taking any serious decision. However, this time he failed to inform his father of what were his intentions.

Stambolov who had done so much to bring the prince back was very angry. He heard about the telegrams, he told his friends about the prince: "This is the man for whom we have roused the whole of Bulgaria, have put our necks into the noose and brother has raised sword against brother, and he takes such an momentous decision without even telling us beforehand; he throws his crown at the feet of a foreign ruler and keeps us in the dark about it." [Corti, 241-242.] Alexander tried to convince his father and even Bulgarian leaders that he took this step because the later want reconciliation with Russia.

In a letter on September 6, 1886 to Queen Victoria, the prince attempted to justify his decision to abdicate: "I beg your Majesty to believe that I have only come to the decision of abdication after mature deliberation. Three-fourths of all officers are mixed up in the conspiracy....The people and the soldiers are on my side, but supported alone by them I cannot govern. The whole Clergy is also implicated... the people demand reconciliation with Russia.... My remaining any longer would only cause a civil war...as soon, however, as blood flows, Russia will ... occupy Bulgaria, which Europe would not be able to prevent." [Cited in Corti, 245.] A few days later, in a draft note, Alexander presented more reasons to the British Queen for his decision to abdicate. According to Corti, Alexander said that "the loss of his crown of thorns hurt him less than the unhappy experiences he had had with so many who had possessed his confidence. The political immaturity of the people, the

utter unreliability of part of the Bulgarian intelligentsia and the unfortunate policy followed by Europe had made it impossible for him to govern the country. 'The army of which I was so proud has lent itself to take me prisoner... I was made use of as a bulwark against Russia, and, as soon as the latter took this amiss, I was allowed to fall without an attempt being made to help me (viz. Germany and Austria)... If only part of Your Majesty's advice and forethought for Bulgaria and myself had been followed and acted upon by Europe, matters would stand quite different now.' [Cited in Corti, 246]

The Prince showed his greatest indignation and anger for those officers "who on the eve (of the coup d'état) were still eating at my table, those very ones who saw me risk death for them – *they betrayed me!*" Alexander condemns the officers on legal and moral grounds for being involved in this affair and for taking such an action. Since he truly loved them, he believed, they should have remained true to their oath and not betrayed him. This, of course, was a very self-serving position to take. Such writing brings to mind is another metaphor that Alexander used to pronounce himself and convince others that he is not guilty of anything. There is an attempt made by Alexander to present himself as a martyr. In this case one can not but think of "The Last Supper" from the Bible and the famous masterpiece by Leonardo da Vinci where Jesus is betrayed the next day by Judas. In his letter Prince Alexander portrays the officers, that he loved so much and had the last meal with them, not much different than Judas. They are Judases, betrayers of their monarch who broke the loyalty oath they had taken to be faithful to the prince. There is, of course, no proof that Alexander was thinking exactly like the comparison made here. However, the symbolical reference is so obvious that one cannot but notice that the similarities between the Biblical Last Supper and Alexander's expression that "those who on the eve were still eating at my table," betrayed him.

The officers that the prince calls betrayers were all loyal Bulgarian patriots and some of them had participated in the national liberation struggles and the war for the liberation of their country. Many had studied in Russian military schools and were Russophiles. Captain **Atanas Benderev** was one of those involved in the plot against the prince. He disobeyed the orders of the commander in chief at the decisive battle at Slivnitsa during the Serbian-Bulgarian War but by doing so helped the Bulgarians win the war. In Slivnitsa, while planning strategy, Benderev, referring to the prince said: "This German understands strategy as much as a..." Alexander heard this and the result was that at the end of the war, he was neither decorated nor promoted to major. This occurrence is presented by writers as a reason for Benderev's involvement in the conspiracy against the prince. Benderev, during the coup d'état days was member of the General Staff and in the War Office. The second important military man involved were **Major**

Petur Dimitrov Gruev, commander of the Sofia Military Academy and a Russophile who did not like the prince's policies. **Major Radko Dimitriev**, the third figure, was like Benderev, associated with the War Office "allegedly joined at least in part as a result of wounded vanity, for he had not been chosen to head the general staff." The motives of these officers may look like trifles and petty but place in the context of the political situation in the country and its international position, including the major divisions of Russophiles and Russophobes, became very significant. [See Simeon Radev, *Stroitelite süvrēmenna Būlgariia* Edition: 2d ed. Sofia: P. Glushkov, 1911. Vol 1, 654–657, 796]

Prince Alexander was informed and even warned of the coming plot but he 'paid no heed to them and could not or would not believe that officers of the brave Bulgarian army which he had led to victory would let themselves be used against their Prince by disloyal henchmen in the service of foreigners." Even before his unseating, Alexander told one of his advisers that "I do not wish to remain Prince of Bulgaria by force, if they do not want me, then let them tell me so and I will go voluntarily." He is supposed to have repeated this to Gruev and Dimitriev when they went to arrest him and told him: **"Our country is lost if you remain on the throne of Bulgaria. Abdicate."** To this warning Alexander replied: **"If I had known that there was anyone in the army who wanted that I would have gone of my own accord."** As he was taken away and departed Bulgarian soil, Alexander told the guard that he had loved the army and the people: **"May your future Price love the army and Bulgaria as much as I have done. Farewell."** [Cited in Egon Caesar Conte Corti, *Alexander von Battenberg*. Translated by E. M. Hodgson. London: Cassell and Co. 1954. 229. A short recent account on the unseating of Prince Alexander and some of the individuals involved is given in Duncan M. Perry, *Stefan Stambolov and the Emergence of Modern Bulgaria, 1870–1895*. Durham and London: Duke University Press, 1993. 88–99.]

One can argue that in the officers' opinion, Alexander's leadership in the army and even as a ruler did not necessarily signify his internalization of the Bulgarian national ideal and that the Prince was an imperfect fit for ideas of national unity. Before the Serbian-Bulgarian War the rank and file soldiery were more likely to articulate loyalty to their Bulgarian officers and even Russian officers than to the Prince. Moreover, it seems that since the Prince was of the same age or younger than some of the officers, the latter did not like his paternalism.

Nationalist sentiments were not the only sentiment in opposing the Prince. Some officers were driven by social status and adventure in their antagonism to the monarch. Orthodoxy and the role of religion and the clergy in shaping and interpreting the officers' war experiences and motives often co-existed with their ideals of nationalism.

The officers, by appointing Kliment, Metropolitan of Turnovo, as head of the "revolutionary" government after the coup d'état, gave some credence to the

fact that the Bulgarian church was responsible for galvanizing pro-Bulgarian and pro Russian feelings and anti Princely sentiments.

In dethroning the Prince, the officers believed that they were acting in concord with some of the politicians, especially the Russophiles who regarded Battenberg as a "foreigner," a German and a Russophobe. He was seen by some as the figure of all evils awaiting the country. They saw Alexander as someone who pretended to be a great military leader while attempting to turn officers and politicians against the liberators of Bulgaria. Some were aware that the Prince was an individual who nourished a special enmity against the most unrelenting of his enemies, Tsar Alexander III., his cousin!

The truth is that most of the writings that treat this period reveal the complex discourse that lay behind the struggle between Russian Tsar Alexander III and the Bulgarian Prince. The personal enmity between Tsar and Prince had its roots in the policies and methods of rule used by both sides.

In this discourse, the main protagonists are seen to be unable to communicate even at the personal level as relatives. However, the issues between them escalated, and the Prince became a problem for Bulgarians who were aware that the Great Powers wanted them to have a monarch friendly to their interests. Even among the Russophiles there are doubts since they were not really sure of what Battenberg represented and what would happen to the country if he was to be force out of the country; whether the Prince was carrying out the wishes or dictates of Berlin, Vienna or London; whether he was the builder of a new Bulgaria or its destroyer; whether he was going to be bound by the will of the people or become the usurper of the democratic freedoms of the Bulgarians.

Among the officers and other Russophiles, there was hope but less confidence that Bulgaria would be capable of putting up a popular resistance to Battenberg and the Russophobes. In their turn, the Russophobes developed an antipathy to Russian interference in Bulgaria's domestic affairs and when they saw that the Prince sided with them and they achieved influence and powers, became more and more determined to move closer to the British and the Habsburgs. Such divisions and anxieties among politicians about their positions in Bulgarian society and relations toward the Great Powers were transmitted to the officer corps.

Looking to the future from afar, Prince Alexander wrote that "Perhaps the Bulgarians will find a happier prince than me, but they will never find one who will love them as I loved them" This, too, was a way to express something that at that time could not be ascertained. When Alexander decided to say good bye to the Bulgarians and diplomats in Sofia, he state: "I leave Bulgaria as a friend and not as an enemy. I have only one wish – that this country may be happy and as proof of this I am sacrificing myself." [Cited Corti, 247.] Prince Alexander's declaration of love for the Bulgarians as presented in such emphatic terms in this

letter, brings to mind another analogy, the **"Golden Speech"** of **Queen Elizabeth I** (1533–1603) given on November 30, 1601 to members of Parliament in which she stated: **"There will never queen sit in my seat with more zeal to my country, care to my subjects, and that will sooner with willingness venture her life for your good and safety, than myself. For it is not my desire to live nor reign longer than my life and reign shall be for your good. And though you have had and may have many princes more mighty and wise sitting in this seat, yet you never had or shall have any that will be more careful or loving."** In another version the last part is rendered as **"And though you had had and may have many mightier and wiser princes sitting in this seat, yet you never had nor shall have any that will love you better"** [Elizabeth I. *Collected Works*. Edited by Leah S. Marcus, Janet Mueller, and Mary Beth Rose. Chicago and London: The University of Chicago Press, 2000, 339–340 and 342.] The similarities of these messages may be only incidental. However, they reveal aspects of how monarchs perceived their duty and also the similarities of conditions that produce such emotions and thinking. Elizabeth's reign was also one of considerable danger and difficulty for many, with rebellion in northern England and threats of invasion from abroad.

It seems that **Prince Alexander** believed that his love for the **Bulgarians** had a redemptive force that may compensate for the loss of his crown. He was concerned too much with himself, with his personal power and the present and did not try to see the long term consequences of his ideas and actions. This was the case, for example, when confronted with a democratic constitution and national assembly he decided to dissolve the assembly and change the fundamental law. Somehow the question of his future relations with the elected representatives and accountability did not concern him at that moment. He should have known that he was responsible for his actions whether or not they proved to be right or wrong and that he would be held responsible for his policies no matter what the intention and outcome. It seems that the pace of change that characterized the political life of the country was such that Prince Alexander and politicians were unable to adapt themselves to the new changing internal conditions and external circumstances and were therefore not fully prepared and did not grasp the idea that with the great successes in the struggle for unification and the war came great risks. Among those risks was the forceful unseating and then abdication of Prince Alexander.

In defense of Prince Alexander's writing this letter and some of his previous and subsequent statements on his love for the army and people, it must be mentioned that intimate letter-writing in the nineteenth century was many people "confessed" their feelings. It is in this context that Alexander's images of loving Bulgarian soldiers like a woman, the use of terms like broken heart, feelings of tenderness, etc. evoke the emotional make up of many people of the period. It may

be that this care of his for the Bulgarians was responsible for the preservation of his memory and the erection of a mausoleum in Sofia.

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СЛЕДОСВОБОЖДЕНСКИЯТ ШУМЕН (1878–1881)

РОСИЦА АНГЕЛОВА

Април 1877 г. слага началото на Руско-турската война, наречена от българите – Освободителна. Тревожни и радостни дни обикалят Шумен. Шуменци не остават безучастни в борбата за свобода. Мнозина от тях емигрират в Добруджа и Влашко и се вливат в Опълчението. Над 130 души, родом от Шумен, се сражават рамо до рамо с руските войници, проливайки кръвта си по бойните полета на Стара Загора, Шипка, Шейново и в защита на Самарското знаме.

Телеграмата за примирието, постигнато и подписано на 31 януари 1878 г. в Одрин, пристига в щаба на XIV корпус на ген. Цимерман на 3 срещу 4 февруари 1878 г. Уточнена е демаркационната линия. В руската зона влизат Балчик и Хаджиоглу Пазарджик (дн. гр. Добрич), а Варна и Шумен остават в турски ръце.

Надеждата за скорошно освобождение кара шуменци да участват в руското разузнаване, давайки точна информация за турския военен гарнизон и състоянието на Шуменската крепост.

Изоставянето на крепостите Варна и Шумен в турско владение, въпреки че Санстефанският и Берлинският договор ги присъединяват към Българското княжество, забавя тяхното освобождаване¹, изграждане на административни органи и въвеждане на българско гражданско управление в тях.

Едва на 6 юли 1878 г. празничният звън на камбаните ще извести свободата за Шумен, когато ген. Сергей Белокопитов тържествено ще влезе с 5-и Калужки пехотен полк. Шуменци посрещат радостно освободителите и поднасят приветствен адрес до руския император. Той от своя страна по-късно изпраща на шуменската общественост икона на св. св. Кирил и Методий. Иконата е от руски тип и има надпис на медна пластинка – „Тази икона посвещавам за спомен на църквата „Възнесение господне“. След получаването ѝ митрополит Симеон изказва благодарност за направения подарък от името на шуменските граждани².

Руско-турската освободителна война възстановява българската държавност и поставя началото на изграждането на държавното управление, местната администрация и гражданското общество в България. Дискурсът има за цел да даде пълна представа за трудното начало по възстановяването на държавността и местното самоуправление в Шумен – дотогава важен административен и военен център на Османската империя.

С приказ № 79 руският императорски комисар постановява от 1 януари 1879 г. Шуменски и Силистренски окръг да се отчислят от Русенска и да се

THE 1912 SALONIKA ISSUE*

DIMITRIS MICHALOPOULOS

In memory of Simeon Damjanov

At the outbreak of the First Balkan War, the Greek leadership, both political and military, was in a cleft stick. The humiliation that Greece had suffered during the Crimean War at the hands of the French and the British and the 1897 defeat of the Greek Army by the Turks were experiences too bitter to be easily forgotten. There is not the slightest doubt that the Greek forces were four times superior in number to the Ottoman ones in Southern Macedonia, i.e. 100,000 Greeks to 25,000 Turks¹; moreover, during the course of the operations the Greek Army doubled in number to what it had been at the beginning of the war, because many Greek-Americans rushed to the Balkans as volunteers². Nonetheless, the prestige of the Ottoman warriors was still high in Southeastern Europe³; and nobody could hazard a guess as to the outcome of the conflict. The only trump card Greece then really held was her Fleet – above all the speedy battleship “Averoff”, purchased as early as 1909 and built in the Orlando Shipyards at Leghorn⁴. Thanks to the “Averoff”, the Greeks were able to thwart the Porte’s troops’ progress from Asia to the Balkans through the Archipelago⁵.

It is well known that the understanding between the Balkan governments took shape in May 1912⁶; and Bulgaria had a pivotal role to play, for she acted as an intermediary between all interested parties. As a matter of fact, her prosperity had gradually increased since 1878: her population had been growing steadily, numerous railway systems had been constructed, and her Army had been effectively organized⁷. Thus Bulgaria, when she declared herself independent in 1908, was worthy to occupy a powerful position in Southeastern Europe. Truth to tell, she was then the most powerful State in the Balkans, because her resounding victory over the Serbs in 1885 had emblazoned her army with the glow of glory. The contrast to the defeated Serbia, the humiliated Greece and tiny Montenegro was strikingly eloquent.

On the other hand, the participation of Greece in the Balkan League was a Veniselos’ great achievement. Born in Mournies, a village near Canea, in those days the capital of Crete, in 1864, Eleutherios Veniselos was the son of *Kyriakos*, a ‘hellenized’ Armenian who, after a long series of adventures in Anatolia and in Greece, disembarked in Canea at the time of the Crimean War (1853–1856)⁸. As a

* As usual, many thanks are due to Professor Michael Lumley for having read the manuscript and making many valuable suggestions.

result of his wanderings in Southern Greece he was nicknamed *Binizelos*⁹; and in Crete he was widely known as *Venizelos*¹⁰ – the scholarly form of his nickname.

Upon his arrival in Crete Kyriakos was already a naturalized Greek; thus his son was a Greek citizen “by birth”. In fact, according to a Greek law put into effect in 1856¹¹, everybody whose father was a Greek national had *ipso facto* Greek citizenship; thus the name “Veniselos” became something of a symbol – a radiant one in the Contemporary History of Greece.

Be that as it may, Eleutherios Veniselos studied in the Law School of the University of Athens. He obtained his *ptychion*¹² in 1887; and afterwards he settled in Canea and became a lawyer. He came to the fore rapidly; and when in 1909 a successful military coup was engineered in Greece, near Athens¹³, he was regarded by the young officers, who had the real power in their hands, as the one “Chosen” to carry out the radical reforms Greece desperately needed. As a result Veniselos disembarked in Piraeus in early September 1910. To tell the truth, the young officers’ brilliantly thought out scheme might have set in train serious complications, for Veniselos was born in Ottoman territory. But all was well. As mentioned above he was, thanks to the 1856 Greek law No.391, a Greek national; thus he formed a government shortly after his arrival in Athens.

It is well known that neither George I, King of the Hellenes, nor Constantine, his son and Crown Prince, were entirely favourable to the Greek-Bulgarian rapprochement¹⁴. Nonetheless, the understanding between the two countries was propelled by James Bouchier, the London *Times* correspondent in the Balkans, a quasi all-mighty *éminence grise* in international affairs; and given that the Greek Royal House was traditionally an Anglophile one, King George had no other choice but to respect the desires of Veniselos’ government. Shortly afterwards, in the first days of October 1912¹⁵, the hostilities between Bulgaria, Serbia, Greece¹⁶ and the Ottoman Porte began.

I

At the beginning of the war, cloudy were the intentions of the Greek military leadership: in general terms, the main target of the operations was to annihilate the Turkish troops covering the border and afterwards, moving along the valley of the Vardar, to deal a severe blow to the Ottoman forces fighting the Serbs; the Greek Army, in other words, was to swoop down on Bitola from the south¹⁷. Nonetheless, all this was doubtful, for the Ottomans had heavily fortified the region bordering on Greece – namely the famous Sarantaporon and Demir Kapi¹⁸ gorges. The first surprise was sprung in the night of 9/10 October, when it was discovered that after some engagements the Ottoman troops were abandoning their positions¹⁹; as a corollary, there were no more obstacles as far as the advance of the Greek Army was concerned. Nevertheless, bigger surprises were in store

in the next few days: a bridge over the Bistrica river had been left intact and so a Greek Cavalry brigade was able to cross the river and capture Kozani, an important county town in Southwestern Macedonia, commanding several communication routes. The heights near Kozani were well fortified, too; but still the Greeks occupied the town on 11 October without meeting any opposition²⁰.

Kozani's occupation meant emphatically that the Greek Army might henceforth advance northward. In point of fact, very strange was the attitude of Hasan Tahsin pasha, the Commander-in-Chief of the Ottoman troops deployed against the Greek forces in Southern Macedonia. He was of Albanian stock and began his career as a rural policeman. Afterwards he became an NCO in the Ottoman Army; he was commissioned and promoted to the rank of general thanks mainly to his political connections²¹. At the beginning of the war, he was the Commander of the VIII Army Corps, whose headquarters were in... Damascus, Syria. Nevertheless and given that the above Army Corps came under the military authority of Salonika (a heavily fortified town), Hasan Tahsin pasha was appointed Commander-in-Chief of the Ottoman troops at the... Bistrica river; and in the end an "extraordinary" VIII Army Corps, obviously imaginary, was created having its headquarters at Kozani, where, by means of juggling, he gained the command!²² Truth to tell, he was an "old and experienced" Army officer²³; and his very experience in warfare makes his obvious defeatism incomprehensible. In fact, after the first engagements on the border, he declared loudly: "everything is lost"²⁴; and he sounded the retreat to Salonika.

Was he bribed? This is the most plausible explanation²⁵. Moreover he was an important landowner in the area around Salonika²⁶; and he was terrified of the anti-plutocratic doctrines put forward by the Internal Macedonian Revolutionary Organization (IMRO). It is well known that the prelude to the 1903 Ilinden Insurrection was the bomb attacks which took place in Salonika in the spring of the year 1903. These attacks were carried out by the "Boatmen", an anarchist IMRO group, and were intended to provoke the intervention of the Great Powers²⁷. In fact, this aim was achieved through the famous 1903 Mürzsteg agreement between Austria-Hungary and Russia. Nonetheless, the repression by the Ottoman authorities which followed in 1903 was terrible: almost all of the "terrorists" met a tragic end. But far more important were the facts that the "Boatmen" were regarded as Bulgarians, and that the bomb attacks panicked the inhabitants of Salonika, of whom the vast majority was then Jewish²⁸. The corollary was that in 1912 the Jews of Salonika ardently wished the town to be captured by the Greeks and not by the Bulgarians. It was widely known, moreover, that the Greeks were lenient towards Jews (and Moslems alike)²⁹.

II

It was in that way that Hasan Tahsin pasha took Constantine, the Crown Prince of Greece and the Generalissimo of the Greek Army, to Salonika. The move to Bitola along the valley of the Vardar never took place. Nonetheless Constantine, obviously unaware of the intrigue (fortunately) surrounding him, was always hesitant to go onto the attack against Salonika. So the time was ripe for diplomatic intervention. On October 23, Lambros Koromilas, the Greek Foreign Minister, cabled Constantine that the Ottoman troops were not about to put up any resistance to the Greek advance onto Salonika, given that the field officers had already... deserted!³⁰ And merely a day later, he sent the Generalissimo the following laconic message: "According to information from Berlin... the ambassador [of a Great Power] well disposed towards Greece implores you [i.e. the Greek Crown Prince and Generalissimo] to enter Salonika the sooner the better; if so, it is most likely that the Great Powers will agree to Salonika being annexed by Greece"³¹.

It was the first time that the annexation of Salonika by Greece had been put forward. As a matter of fact, Constantine was reluctant to advance to the metropolis of Macedonia not only because it was a heavily fortified town but also because it was well known that Austria-Hungary coveted that important port. Nevertheless—and in order to avoid Salonika being captured by the Bulgarians—the town was offered to Greece; and the Jews with their international connections were the main factor for this offer being made.

Today we know who was the ambassador at Berlin who "implored" the Greek Generalissimo to enter Salonika the sooner the better: it was Jules Cambon, the ambassador of France³².

III

Hasan Tahsin pasha signed the surrender of Salonika to the Greeks on 26 October 1912³³. Nonetheless, the Greek Army was not the first to enter the town. In point of fact, the notorious Jane Sandansky with his irregulars, that is the IMRO komitadjis, had entered Salonika ahead of the Greeks³⁴. It is beyond the scope of this paper to analyze (let alone criticize) the bitter rivalries between Sandansky's followers and the Bulgarians. However that may be, it is certain that Sandansky and his famous komitadjis, forgetting then the enmity between themselves and the Sofia government, took part in the operations against the Ottomans as irregulars of the Bulgarian Army; and after having entered Salonika they tried to legitimize the capture of the city by them: they hurried to the Saint Sophia mosque³⁵ and placed the Bulgarian flag atop the minaret³⁶. Moreover, they were intending to sing a Te Deum in Saint Sophia on the 1st November, thus reinstating the mosque as a Christian church—a symbolic act of very wide scope, given the moral magnetism

of Saint Sophia (regardless of whether in İstanbul or Salonika) on the Balkan Orthodox populations. Nonetheless, the Bulgarian Army had already recognized the capture of Salonika by Greek regular troops³⁷. Salonika therefore fell under the jurisdiction of the Greek military authorities; and when the Greek General Staff put a ban on the *Te Deum* to be sung by Sandansky's komitadjis, the Bulgarians raised no objection³⁸.

What followed was easy to foresee. The establishment of an Albanian state deprived the Serbs of an outlet to the sea; and they began disputing with the Bulgarians what was an important part of Macedonian territory. As a matter of fact, the Bulgarians were right in insisting, in 1912, on the importance of the Balkan League. Thanks to the reforms carried out by the Young Turks, what had been good in the old Ottoman Army was then destroyed and the Sublime Porte was disarmed³⁹. Moreover, the military alliance of the four –Christian– Balkan States for an attack on Turkey appeared to be, so far as the Balkan Peninsula itself was concerned, the eventuality that was regarded by the Porte as the most perilous of all possibilities⁴⁰. The attack made by the allied Balkan States on the Turkish military forces came when they were still involved in a process of change⁴¹. Nevertheless, the main antagonist of the Turks was, by far, the Bulgarian Army; and only the entrenched camp of Adrianople then barred the line of advance from the Bulgarian border to İstanbul. In other words, the main Bulgarian Army had to do not only with the bulk of the Ottoman forces in Europe but also with the Gordian knot of the Ottomans' power in the Balkans.

When the Bulgarians, exasperated by the loss of the major part of Macedonia, began to quarrel with the Greeks about what was to be done with Salonika, Eleutherios Veniselos, still prime minister of Greece, agreed to submit the issue to the arbitration of Nicholas II, Emperor of Russia⁴²; which meant that the Balkans were to come under the aegis of St. Petersburg. And then another Ems-like telegram appeared. Lambros Koromilas, the Greek Foreign minister⁴³, issued to the Greek Press a fake diplomatic note, roundly insulting Bulgarians⁴⁴. Veniselos at once fired his Foreign minister⁴⁵; but it was too late for the war broke out in June 1913. And the Bulgarians, decimated by the cholera, were defeated.

CONCLUSIONS

We do not yet know the full story of the Balkan Wars. It is doubtless that the Christian populations of Macedonia were willing to get rid of the Ottoman sovereignty; it goes without saying, too, that the Christian States of the Peninsula wanted the Porte's yoke on their brethren to be removed. Nonetheless, the Hasan Tahsin pasha and Lambros Koromilas cases provide us with evidence that in the back room of international politics a major planning had then taken place and ter-

rible means of persuasion were being used. Why? And by whom? It is too early to give an answer. Nevertheless, a plausible hypothesis would be the areas of oil deposits still within the borders of the Ottoman Empire⁴⁶. As early as the first decade of the twentieth century, coal was being substituted for oil in the (British) Royal Navy⁴⁷; and that meant that the end of the Ottoman Empire was at hand.

But let us underline once more that the final answers to these questions must remain to be given in the future.

NOTES

- ¹ See Ministry of War. General Staff of the Army, *The Greek Army in the Balkan Wars, 1912–1913* (in Greek), vol. I. Annex (Athens: National Printing House, 1932), document No. 203, p. 92.
- ² See X. Strategos, *The 1912 Greek-Turkish War* (in Greek), Athens: A publication of the newspaper *Hellenike*, 1932, pp. 45, 48iv.
- ³ Herbert Adams Gibbons, *Venizelos* (Boston and New York: Houghton Mifflin, 1920), p. 118.
- ⁴ See mainly Commodore K. Paizis-Paradellis, *The ships of the Greek War Navy, 1830–1939* (in Greek), Athens: The General Staff of the Navy, 1979, 1–4.
- ⁵ The Ottoman Army was then to be organized into four Field Armies. Two of these were to be assigned to the European theatre of war, though they were to be brought up to their full strength largely by contingents from Asia Minor. (Hermenegild Wagner, *With the victorious Bulgarians* [London: Constable and Company, 1913], p. 109.)
- ⁶ *Ibidem*, p. 5.
- ⁷ See mainly H. Charles Woods, *The Danger Zone of Europe. Changes and Problems in the Near East* (London and Leipzig: T. Fisher Unwin, 1911), p. 284.
- ⁸ See mainly Manoussos Koundouros, *Historical and diplomatic revelations. Historic events, 1890–1923* (in Greek). Edited by Harikleia G. Demakopoulou and Eleutherios G. Skiadas (Athens: ELIA, 1997), p. 329.
- ⁹ A common name even today in the Morea.
- ¹⁰ Written in French: Vénisélos; and in English: Veniselos.
- ¹¹ The law No. 391/1856, art. 14–28 (mainly art. 14).
- ¹² The Greek traditional university diploma, obtained after four years of studies; i.e. something between the Bachelor's and the Master's degree of an American or British university.
- ¹³ The so called Goudi coup.
- ¹⁴ See Crawford Price, *Venizelos and the War. A sketch of personalities and politics* (London: Simpkin, Marshall, Hamilton, Kent, 1917), p. 17.
- ¹⁵ Dates are given accordingly to the Old Style.
- ¹⁶ It is known that Montenegro had earlier declared war against Turkey.
- ¹⁷ See Ministry of War. General Staff of the Army, *The Greek Army in the Balkan Wars, 1912–1913*, *op. cit.*, vol. I. Annex, document No. 21, p. 14.
- ¹⁸ Demir Kapý = Iron Gate.
- ¹⁹ General Staff of the Army, *A short history of the Balkan Wars, 1912–1913* (in Greek), Athens: The Military History Service, 1987, 30–31.
- ²⁰ *Ibidem*, p. 34.
- ²¹ See Basil Nikoltsios and Basil K. Gounaris, *From Sarantaporon up to Salonika. The 1912 Greek-Turkish conflict through the Memoirs of the General Hasan Tahsin pasha* (in Greek), Salonika, 2002, p. 10.
- ²² General Staff of the Army, *The Greek Army in the Balkan Wars, 1912–1913* (in Greek), vol. I (Athens: The Military History Service, 1988), p. 28.

- 23 X. Strategos, *op.cit.*, p. 13.
- 24 *Ibidem*.
- 25 See Herbert Adam Gibbons, *op.cit.*, p. 125.
- 26 B. Nikoltsios and B. K. Gounaris, *op.cit.*, p. 10.
- 27 See mainly Yannes Megas, *The Salonika Boatmen. The anarchist Bulgarian group and the 1903 bomb attacks* (in Greek), Athens: Trochalia, 1994.
- 28 According to a census carried out between the First and the Second Balkan War, the population of Salonika was 157,889 people – namely 61,439 Jews, 45,867 Moslems and 39,956 Greek Orthodox (Patriarchists). See Dimitris Michalopoulos, “Salonika. The Ottoman period and Modern Times” (in Greek), *Encyclopaedia Papyros-Larousse-Britannica*, vol. XXVIII (Athens: Papyros, 1984), p. 120. Most likely, however, in October 1912 the Jewish population was larger, about 90,000 people, and the Greek-Orthodox smaller – merely 17,000. See *The Memoirs of Pericles Argyropoulos* (in Greek), Athens, 1970, p. 107.
- 29 Pierre Loti, *Turquie agonisante* (Paris: Calmann-Lévy, 1913), p. 70.
- 30 See Ministry of War. General Staff of the Army, *The Greek Army in the Balkan Wars, 1912–1913*, *op. cit.*, vol. I. Annex, document No. 702, p. 250.
- 31 *Ibidem*, document No. 728, p. 257.
- 32 *The Memoirs of Pericles Argyropoulos*, *op. cit.*, p. 101.
- 33 In fact, the surrender was signed during the first hours of 27 October; but it was agreed to date the relevant document the 26th. (See Victor Dousmanis, *Memoirs* [in Greek], Athens: Petros Dimitrakos, n.d., p. 57.)
- 34 *The Memoirs of Pericles Argyropoulos*, *op. cit.*, 103–104.
- 35 It was the principal ancient church of Salonika. (See Herbert Adams Gibbons, *op. cit.*, p. 125; cf. Semavi Eyice, *Selânik Ayasofyası ve garip bir restorasyon projesi* [İstanbul, 2005].)
- 36 Herbert Adams Gibbons, *op. cit.*, p. 125.
- 37 *The Memoirs of Pericles Argyropoulos*, *op.cit.*, p. 104.
- 38 See mainly General P. G. Danglis, *Memoirs – Documents – Correspondence. His papers* (in Greek). Edited by X. Leucoparidis, vol. II (Athens: Vayonakis, 1965), p. 16.
- 39 H. Wagner, *op. cit.*, p. 110.
- 40 *Ibidem*, p. 108.
- 41 *Ibidem*, p. 111.
- 42 See newspaper *Nea Hemera Tergestes* (= The Trieste New Day [published nonetheless in Athens]), April 18, 1913, p. 7; May 15, 1913, p. 7; May 16, 1913, p. 1; May 18, 1913, p. 4; May 19, 1913, pp. 7, 10.
- 43 He was married in 1911 to Anna Ewing Cockrell, a member of an influential American family. (See Percy F. Martin, *Greece of the twentieth century* [London-Leipsic: T. Fisher Unwin, 1913]), p. 54.)
- 44 See newspaper *Nea Hemera Tergestes*, June 20, 1913, p. 7.
- 45 Eleutherios Veniselos Papers (Athens: Historical Institute for studies on Eleutherios Veniselos and his Era), I/33/85, Eleutherios Veniselos to the King Constantine (n. d. [1913]).
- 46 See *War Memoirs of David Lloyd George*, vol. I (London: Odhams Press, n.d.), p. 480.
- 47 See Winston S. Churchill, *The World Crisis, 1911–1918*, vol. I (London: Odhams Press, n.d.), pp. 93, 101, 102.

BIO-POLITICS IN THE KINGDOM OF BULGARIA. THE EMERGENCE OF A NEW TECHNOLOGY OF POWER¹

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According to the French philosopher Michel Foucault (1926–1984) the theory of *sovereignty* and, consequently, the separation of executive, legislative and judicial powers cannot sufficiently describe the role of power in modern societies. There always remains a gap between reality and the noble idea that power is represented by a sovereign, be it the monarch to whom the people once had transferred its power, or be it the people itself als the theoretical source of sovereignty in republican constitutions. And what is more, Foucault rejects those approaches which consider power merely an emanation of the state; for him it is rather a relation present in every part of society and particularly in places like prisons, schools, barracks, factories, hospitals and asylums. Foucault calls the form of power, present and executed in such institutions, *disciplinary power*; its specificity lies in the technologies applied in order to survey and train the bodies of individuals resp. inmates. Foucault has described disciplinary power in his book *Discipline and Punish: The Birth of the Prison* which was published in French in 1975.²

Foucault even considered his own expansion of the traditional understanding of power by disciplinary power insufficient in order to assess the functioning of modern societies; he therefore added a second concept which he called *governmentality*. Unlike sovereignty governmentality does not address *the people* (народ, in Bulgarian) as the collectivity of the subjects of the monarch or as the theoretical sovereign himself; nor does it – like disciplinary power – concentrate on the training of *individual bodies*; governmentality rather works with *population* (население, in Bulgarian) living on the territory of the state und subject to various forms of leadership and management. Governmentality tries to describe those forms of governing which arose with the creation of modern bureaucracies since the 18th century. It operates with the concept of normality which is supposed to be achieved by the population. For this purpose it applies new forms of counting and measuring – statistics and demography; it goes one step further than disciplinary power, since it addresses the self-governing abilities of the population in its commitment for controlling its everyday conduct and habits, as can be observed e.g. in the fields of hygiene and moral economies. Foucault worked out the concept of governmentality in his lectures *Security, Territory, Population* (1977–1978) and *The Birth of Biopolitics* (1978–1979) at the Collège de France.³

In this period Foucault also introduced the term *biopolitics* (or *biopower*). Biopolitics is in close relationship with governmentality, if not even a special part of it, since it concentrates on the biological aspects of population. As Foucault

stresses, a central aspect of biopolitics has to do with the biologicistic reinterpretation of the term *race* in the 19th century. At that time it came to the development of various racial theories which claimed to give biological "evidence" for a hierarchy among "races", peoples and nations. Academic science partly rejected these theories by not taking them serious, but partly reflected them in the traditional humanities and certainly adopted them within the new disciplines of physical resp. racial anthropology. Thus in the long run anthropology would contribute to the differentiation between "us" and the "other" and form part of the constant discussion about the "essence" of the own nation. Foucault, being more fundamental, considers here the starting point of the dividing line between those who deserve to live and those who are to die – which came to its full expression in the mass crimes of the Third Reich⁴. Racial anthropology and racialism were not specific for Nazi-Germany, however. Until the Second World War they were also present and partly accepted among humanities in other European states.⁵

Another form of biopolitics is to control the health and reproduction of a given population. It became feasible with the development of demography and of sanitary statistics which allowed to measure coefficients like mortality, morbidity and birthrates. From the biopolitical point of view medicine was not only a curative science, but became a vector of public health. Health became a matter of national economy and national wealth; medicine started to operate within a framework of preventive technologies and policies of hygiene which aimed to secure and to increase the level of health among the population. Since the number of population became likewise an economic factor we can observe attempts to influence reproduction via demographic policies either for the purpose to prevent the population of having too many children (malthusianist and neo-malthusianist approaches), or, the other way round, in order to foster families with many children – as was the case in several European states after the First World War when birthrates started to decrease.⁶ A still more radical approach did not restrict itself to influence the quantitative aspects of reproduction but laid its focus on the qualitative ones, i.e. it dealt with the improvement of the genetic make-up of a population by means of eugenics or racial hygiene. The consequences of this approach were sterilization laws in some of the member states of the USA in the early 20th century, the sterilization law of the Third Reich and similar legislation in the Switzerland and the Scandinavian countries in the interwar period.⁷

Unlike the concepts of *disciplinary power* and of *governmentality* Foucault's notion of biopolitics remained sketchy. He mainly wrote about it in the last lecture of his cycle of lectures *Society Must Be Defended* (1975–1976)⁸ and in the last chapter of the first volume of *The History of Sexuality* published in French in 1976.⁹ But even so Foucault's concept of biopolitics is noteworthy, first, because he found a common ground for at the first sight incommensurable approaches like demography, medicine, public health, race and scientific racism by asking for the

underlying logic, strategies, tactics, and health economies, and second, because Foucault put into question the naïve representation of the history of medicine as a narration of inexorable humanitarian progress.

During the last years Foucault's term of biopolitics has become fashionable for describing the far-reaching implications and dangers of reproductive medicine. The Italian philosopher Giorgio Agamben has taken over the terms of biopower and biopolitics as part of his approach to political philosophy.¹⁰ The proliferation of the term and its philosophical reinterpretation, distinct from the original Foucaultian use of *biopolitics*, have almost eclipsed the likewise interesting discussion about the advantage of Foucault's original use of biopolitics for the interpretation of *modernity*.¹¹ It is exactly here where we want to put our question, what relevance this concept can have with respect to the history of modern Bulgaria?

It is obvious that, if we want to understand the role of power in the modern nation state, we can not exclude biopower and the history of public health. Bulgaria as a state came into being without forerunners except for the embryonic civil society of the so-called *Bulgarian Renaissance*. We can therefore observe in detail how modern institutions and discourses of power came into being and how they were further developed. Compared to Western- and Central Europe this happened in a rapid speed, since the difference between the starting level at 1878 and the situation at the middle of the 20th century was much larger than there. At the same time we can observe how Western discourses on modernity and on how to create modernity were discussed and adopted, since this process can not be reduced to a simple operation of "copy-paste". Finally, one can not seek modernity only in the sphere of political, cultural, economic and social history, but also in the sphere of medicine, or to put it more concretely, in the sphere of public health. For the rural population, which made the vast majority of the Bulgarians, modernity was literally represented by the auxiliary doctors (фелдшери), the professional midwives – who were supposed to replace the traditional uneducated obstetricians (баби) from the people –, the country doctors, and finally by the various measures of hygiene which included self-governing practises with respect to personal hygiene and "healthy" behavior.

The historiography on biopolitics in Bulgaria is not starting from nil, if we take into account the traditional works on the history of medicine and public health in Bulgaria, although they are obliged to an unreflected concept of a linear progress of modernity and humanity.¹² But there are also interesting recent works on Bulgarian racism, on Bulgarian Eugenics and on the development of public health in Bulgaria until 1944 which include a critical approach towards the notion of modernity and its ramifications.¹³ This paper tends to be a continuation of this recent research by introducing the concept of biopolitics. But due to the limited number of pages at disposal it only trace down the general development of two branches of biopolitics: *racial anthropology*, which will comprise a larger portion, and eu-

genics, in a shorter survey. Both branches at first sight seem to be exceptional and peripheral for the agrarian character of the Kingdom of Bulgaria, but – as we will show – they nonetheless formed part of the contemporary discussion about the “essence” of the Bulgarian nation and about the position of Bulgaria as a nation state within the European context and, what is more, they dealt with the role of a healthy and numerous population for the future of the nation.

I. RACIAL ANTHROPOLOGY – STEFAN VATEV AND HIS FOLLOWERS

In the 1890s the British physician and ethnologist John Beddoe (1826–1911) in his *Anthropological History of Europe* uttered remarkable words about anthropological research in the Balkans: “Here are fine opportunities for any enterprising Englishmen with money and a taste for travel and adventure, and with sufficient brains to be able to pick up a language. But alas! such men usually seem to care for nothing but ‘killing something.’”¹⁴

The Balkans as playground for Western travellers either as big-game hunters or as anthropologists – this says something about the colonial background which was present in the beginnings of anthropology on the Balkans. But Beddoe unconsciously addressed a further circumstance: The first who made anthropological observations on the Balkans were German, Polish and British anthropologists who had never visited the region. As armchair anthropologists they pronounced their sentences about the origin of the Balkan peoples on the base of reports of informants from the region or by measuring single skulls which had been sent to them.¹⁵ This happened in a period, i.e. the last third of the 19th century, when the so-called “Aryan question” – the quest for the origin of those European nations belonging to the Indoeuropean language group – had already left the realms of linguistic research and was fought with the weapons of physical anthropology, i.e. by measuring “Europeanness” according to the width and length of a cranium.

Current research which deals with the constructive character of modern nations until now has neglected the ramifications of the anthropological and “racial” arguments in the debate on the imagined “nature” and “position” of individual nations within a general “racial” hierarchy of peoples; a debate, which took place in the late 19th and the beginning 20th centuries.¹⁶ This is the more surprising, since the protagonists of physical anthropology often considered themselves the true successors of the first national historians who – like Marin Drinov (1838–1906) in the Bulgarian case – had dealt with the ancient national past only on the base of linguistic and historical artefacts. Physical anthropologists, however, believed that they could add to these artefacts their own lists of body measures; they promised that their lists would contain the permanent, if not supratemporal, of their own nation. They claimed that these traits could be only changed by racial

mixture, which implicitly meant that the results of their colleagues who wanted to assess nationality with the methods of ethnography or cultural history were far more subject to historical change.

Therefore it was only consequent, that not the Litvanian Ivan Juriev Basanovič (1851–1928) who in the late 1880s conducted the first anthropological investigation of a local population in Bulgaria (i.e. in the city and region of Lom)¹⁷ became an anchor person for the national interpretation of anthropological data, but someone who could appear as a speaker for the Bulgarian cause vis-à-vis Western anthropologists. This person was the Stefan Vatev (1866–1946) who had studied medicine in Leipzig (there was no medical faculty in Bulgaria until the end of the First World War). During the years of 1895–1897 Vatev specialized in paediatric medicine in Berlin; there he came in contact with German racial anthropology which had a high standing at that time. He supported Felix von Luschan (1854–1924), the vice-director of the Museum of Ethnology, to take anthropological measures some hundred Africans, who had been shipped to Berlin in 1896 on occasion of the German Colonial Exhibition.¹⁸ In the same year a committee for large-scale studies on Bulgaria and its population was founded in Sofia; this committee for the “Bulgarian Fatherland” (Българско отечество) foresaw a monograph on the anthropological and physiological study of the Bulgarian population. Together with Basanovič and the geographer Atanas Iširkov (1868–1937) Vatev was invited to conduct the investigations in connection with this monograph¹⁹, but apparently Vatev was the only one who took the offer serious. After his return to Bulgaria in 1998 he suggested the establishment of an Anthropological Commission at the Museum of Sofia consisting of an anthropologist, an archeologist and an ethnographer; the commission was supposed to survey medical doctors who should collect contemporary anthropological material among pupils and recruits. It further should investigate prehistorical and historical anthropological materials (skulls, skeletons).²⁰ Vatev wrote:

The Bulgarian – thus history tells – is a mixture of Slavs and Bulgarians of Finnish tribe; Bulgaria, however, in the distant past was the road and guest house of many passing peoples. Out of the remnants of the former peoples who have moved and lived on our soil, out of the remnants of our forefathers and out of the study of the contemporary Bulgarian the task of the anthropologist of the Bulgarian will be to determine by comparison which tribes they were, which tribe the Bulgarian one was and when and how it was mixed with the Slavic one, and [to determine] if the modern Bulgarian represents an independent Slavic type, a Bulgarian one, or a mixture of both of them or of even more types.²¹

It is noteworthy that Vatev in his suggestions for district doctors and recruitment commissions also directed the attention to pathological cases, to hydrocephals, mikrocephals, cretins, dwarfs, albinos, deaf mutes, people with too

few or too many fingers, with missing limbs; monsters and fetusses should be put in alcohol.²² This shows that the Bulgarian anthropological discourse from its beginnings was one of normative health, a biopolitical one, which made the Foucaultian difference between the one “which has to live” and the one which has to die” apparent. The research of pathological cases was also mentioned in the original plan of “Bulgarian Fatherland” in 1896.²³ It is therefore no accident that we will find Vatev almost forty years later, in 1934, among the founding members of the “Bulgarian Society for Eugenics (Racial Hygiene)” (Българско дружество за евгеника [расова хигиена]).²⁴

But let us return to the year of 1898: On agreement with the Ministry of War Vatev instructed military doctors in order to take anthropological measures of about 6000 solders throughout Bulgaria. Vatev informed Johannes Ranke (1836–1916), professor for anthropology in Munich, about the preliminary results of these investigations. Ranke persuaded him to expand the investigations on pupils following the example of Rudolf Virchow (1821–1902) and the German Society for Anthropology, Ethnology and Prehistory who in the 1880s in a mass examination of German pupils had assessed the colours of their eyes, hair and skin. The Bulgarian Ministry of Education supported the plan by ordering the Bulgarian teachers to follow Vatev’s instructions.²⁵ By 1901 Vatev disposed of the colors of eyes, skin and hair of 236,884 pupils and of 31,469 soldiers in the Principality of Bulgaria.²⁶ He followed the advice of Ranke who had suggested to keep the order of Virchow’s school statistics which differentiated between a “blond type” at the top of the scale with blond hair, blue eyes and light skin – as elements of the esteemed “Nordic race” – a “mixed” one and a “dark type”.²⁷ Thus Vatev unwillingly reproduced the hegemonial German racial hierarchy with respect to the Bulgarian which assigned them to a subaltern position: While the “blond type” in Germany had made about thirty percent in Germany, it came only to about nine percent among the Bulgarians, whereby the share in Western Bulgaria was slightly higher than in Eastern Bulgaria.²⁸ Like Virchow, who in his school statistics had tried to measure anthropological differences between German and Jewish pupils, Vatev now attempted to assess such differences between Bulgarians and the ethnic minorities in the principality, like Turks, Pomaks, Armenians, Gagauz and Jews. He gathered data of 54,734 pupils of ethnic minorities. Ironically, this led to the unwelcome result that the “blond type” with respectively thirteen percent was slightly more represented among the Muslim minorites, i.e. among the Turks and the Bulgarian speaking Pomaks, than among the ethnic Bulgarians themselves.²⁹ Was this the reason that Vatev published these unwelcome findings only in German and in two different articles where a direct comparison was evaded? And what is more, it seems that Vatev tried to evade a final assessment of the “racial origin” of the Bulgarians, which had been originally the leitmotif for the enormous administrative effort of measuring a quarter of a million people. He would

publish the final results of his examinations only after almost forty years in 1939 when they were already outdated and marginalized by more recent anthropological research.³⁰

The complications Vatev met with the publication of the results of his research had maybe partly to do with the criticism he was confronted with by single members of the board of "Bulgarian Fatherland", of the Bulgarian Literary Society (Българско книжовно дружество, the later Bulgarian Academy of Sciences) and within the Bulgarian Natural Science Society (Българско природоизпитателно дружество) where he had held lectures about his investigations. The main tenor of the critics was directed against his overemphasis of the significance of anthropological research.³¹ Other critics, like the zoologist Stefan Jurinič (1855–1947), who fought an argument with Vatev in the journal "Bulgarian survey" (Български преглед), considered anthropological research of pupils useless, if they were intended to serve the purpose of assessing the "Bulgarian race" or the "racial composition" of the Bulgarians. Jurinič argued that the somatic traits of pupils – as e.g. the color of the hair – could possibly change before sexual maturity. Therefore grown-ups had to be investigated, and not pupils. Vatev produced no solid counter-argument and long-windedly defended himself with reference to famous Western anthropologists like Virchow whose example he had only followed.³² He made implicit reference, however, to the welcome defencelessness of children becoming subject to anthropological investigations by their teachers for the sake of the nation, when he mentioned the difficulties of data gathering among grown-ups:

What would Mr. Jurinič say, if a teacher, who collects data, came and tells him to take off the hat in order to take a look at his hair, to open his eyes wide in order to have a look at them and to hold back the sleeve in order to take a look at his skin! And now, how will the women be studied? We believe that by this way of observation we will experience many unpleasant adventures because of the boldness of the observer to look women straight in the face, and – still worse – at their skin! Easily said, but unattainable.³³

During the course of the argument Vatev had stressed that anthropological observation of pupils could also serve other purposes than that one of racial composition; it could demonstrate, how the growth of pupils to grown-up takes place in detail in the course of the years, i.e. with respect to weight, size of the body, size of the skull, change of eyesight, and, of course, also possible change of the colors of eyes, hair and skin.³⁴ This remark already indicated the future development of anthropometric research in Bulgaria: They would become topic of research of the school doctors who were introduced in 1905 for the high schools and from now on had to find a middle course between the avoidance of pestering the pupils with anthropological, respectively, anthropometrical measures which could serve the "physical strengthening of the learning youth".³⁵ While in the beginning anthropometric measures concentrated on the collection of unsuspecting somatic data

about various indexes for growth, after the First World War first studies about the onset of sexual maturity among pupils were published. Also Vatev made a contribution in 1925 with a study on the first occurrence of menstruation among Bulgarian females, claiming that females from the towns started to menstruate at an earlier age than those from the countryside.³⁶ During the 1930s the anatomist Milko Balan (1888–1973) conducted anthropological research about the width of the pelvis of Bulgarian females; his findings should not only provide additional documentary evidence for the “racial affiliation” of the Bulgarians, but also an explanation for the frequency of spontaneous births which Balan put down to the fact that the average width of the Bulgarian female pelvis was smaller than that of the European one.³⁷ At the same time it came to extensive investigations about the onset of sexual maturity among pupils; they were conducted under the guidance of the physiologist Dragomir Mateev (1902–1971), inspector of the school doctors in the Ministry of Education.³⁸ We have to add that in these years a general decrease of the birth-rate in Bulgaria was already perceptible and discussed in the public, so the institutions of the state became more and more interested in the circumstances of reproductiveness in Bulgaria; their interest last, but not least included the gathering of anthropological and biological data.

But let us return once more to the beginning of the 20th century: We should at least mention one aspect of Vatev's anthropological observations which was of potential use for national policy. By the help of the Exarchate of the Bulgarian Orthodox Church he managed to get data about the colors of eyes, hair and skin of almost thirty thousand pupils attending the schools of the Exarchate in the then still Ottoman provinces of Thrace and Macedonia. Vatev could demonstrate that the distribution of blond, dark and mixed types was almost the same as among the pupils of the Bulgarian principality.³⁹ He published his results shortly after Vasil Kănčov (1862–1902) had presented his ethnographic statistics on the population of Macedonia.⁴⁰ But there is a significant difference between both of them: While Kănčov's postulated that Bulgarians inside and outside the principality would form an ethnographical entity, Vatev went further and tried to prove that they also formed a biological one.

This was also the idea of Krum Drončilov (1889–1925), the second important racial anthropologist in Bulgaria. Drončilov studied anthropology and geography in Berlin, where he was a pupil of Felix von Luschan. As Vatev more than a decade before, Drončilov started anthropological research with colonial “Negeranthropologie”, i.e. with skulls from African railway construction workers from the colony of German Cameroon who had died during their labor.⁴¹ But the topic of his doctoral dissertation was the anthropology of the Bulgarians. Shortly before and during the Balkan wars of 1912/1913 Drončilov took anthropological measurements from about six hundred Bulgarian recruits and policemen. Compared to Vatev's investigation the number of examined persons was relatively small, but

Drončilov took much more and rather exact and detailed measurements of various parts of the body. The examined persons were presented with the full name, age and the place of origin. Drončilov reached the conclusion that "among the contemporary Bulgarians, apart from the Slavic one, there is also a quantitative significant representation of the Finnish element".⁴²

During the First World War Drončilov examined the racial composition of about five hundred Slavic Macedonians, "Macedonian Bulgarians", and of about one hundred Albanians in Western Macedonia and in Kosovo. The measures were conducted on the spot, i.e. in the territories which were occupied by the Bulgarian army at that time. Drončilov was relatively sparing with comments which could be understood as political interpretation of the dry anthropological data, but yet he could not avoid a certain bias: Although he conceded that there was no homogeneous anthropological type among the Slavic Macedonians, he nonetheless did not put in question their national affiliation as Bulgarians.⁴³ In the case of the Albanians, however, where the same anthropological diversity was predominant, such questions were reasonable and even outspoken:

The presented traits of the physical make-up of the Albanian population show in consequence, that this population represents a colorful mixture of somatic elements. But is still too early to answer the questions, how, when and where these heterogeneous somatic elements gathered under a common culture, a common language, and a common ethnicity.⁴⁴

Maybe this more "objective approach" in the case of the Albanians had to do with a different way of looking than in the emotional case of the Macedonian Slavs, while the first ones were foreign to the Bulgarian nation, the latter were supposed to form part of it. One could even assume that Drončilov's cool view of the Albanians was akin to that one of German anthropology of the indigenous population of the *Reich's* African colonies, and that's exactly the way how Drončilov was trained as a student.

The unexpected early death of Drončilov in 1925 let racial anthropology move into the background for some years. When it came back in the the 1930s, it was no longer a dry matter of measuring skulls and other parts of the body alone, but included blood group analysis.⁴⁵ The latter brought racial anthropology in close context with genetics, the Mendelian laws of heredity, and with Darwinism. Therefore a close link could be established between racial anthropology, racial hygiene and those racial theories which claimed to take Darwinism as a starting base and which were mainly propagated by the *Third Reich*. One of the first Bulgarians who put these different approach together under a common roof was the medical doctor Hristo Seisov who worked as an assistant at the Biological Institute at the University of Sofia.⁴⁶ Another collaborator of the institute, Panajot Ganev in the years of 1932–1935 had collected data from about six thousand Bulgarians from the King-

dome and from about three thousand refugees from Macedonia; Ganev was the first who besides anthropometrical methods also used blood group analysis.⁴⁷

An anonymous brochure, published probably in 1937 under the title "The Racial Character of the Bulgarians" (Расовият облик на българите) used the results of Ganev's blood group analyses for far-reaching conclusions. The results had showed that the ratio between the blood groups A and B among the Bulgarians was different from that one among other Slavic nations; consequently, the anonymous author claimed that the Bulgarians, although speaking a Slavic language, were no Slavs by origin, but a mixture of a recessive Slavic with a dominant Proto-Bulgarian element.⁴⁸ From there it was not far to the conclusion that the nature of the Bulgarian and the reasons for "Bulgarian nationalism" had to be sought independently from other Slavic nations, especially from Russia; they had to be found in a "Bulgarian philosophy" which included racial hygiene and had its highest expression in the in the "sound and committed fighters for the nation."⁴⁹ Such thinking was common in the discourses of right-wing intellectuals during the second half of the 1930s and in the early 1940s.⁵⁰ But the brochure was unique by using racial anthropology, "objective arguments" from blood group analysis, for such a thinking.

The brochure was positively quoted by German racial anthropologists, this the more since it was published within the framework of the far right-wing Pro-Nazi formation called „Fighters for the progress of Bulgarianhood“ („патници за напредък на България“). Thus there was the assumption that it was authored by the leader of this movement, the agronomist Asen Kantardžiev (1898–1981).⁵¹ But recent research has shown that the author was the biologist Stefan Konsulov (1884–1954).⁵²

Metodij Popov (1881–1954), the head of the Biological Institute in Sofia and the most famous Bulgarian biologist in that period, apparently could not look quiet that results of anthropological examinations of a collaborator at his institute, had been used for one-sided interpretations and political propaganda. Maybe this was the reason that Popov himself searched for public attention. Maybe Popov even knew of the authorship of Konsulov with whom he had some twenty years before even collaborated, but who by now had apparently become a rival and an ideological adversary. Whatever was the case, in 1938 Popov gave public lectures on "The Bulgarian Nation among the European Races and Nations" and on "Heredity, Race and Nation" in which he – as he saw it – wanted to save racial anthropology from racist interpretations. Not all of the lectures could take place; one was broke up by a gang of the „Fighters for the Progress of Bulgarianhood“, so that Popov abstained from further lectures. The contents of the lectures were at least published in two brochures.⁵³ They reveal that Popov stood up against German racial theories and implicitly also against the conclusions of the anonymous brochure on "The Racial Character of the Bulgarians": Popov rejected the idea

of a hierarchy of races with the Nordic Race on the top. He was careful with a definite interpretation of the blood group analysis and claimed that the Bulgarians anthropologically did belong to the Slavs and that Non-Slavic elements would only play a marginal role. These theses were openly directed against Pro-German views which spread at that time in Bulgaria and here we have also to search the reasons for the attack of the „Fighters for the Progress of Bulgarianhood“. Consequently, in the polemical discussion about racism which followed the lectures, Popov was heavily attacked by Konsulov. But, what is more, Popov was also criticized from the left wing. The philosopher Dimităr Mihalčev (1880–1967) reproached him for having described nations as biological entities; Mihalčev took a rather post-modern view nations: for him nations – and consequently also the Bulgarian nation – solely were communities of people who have been thrown together by historical fate; they had nothing in common with biology. The discussion about racism lasted until the beginning of the 1940s, when it became more and more difficult to express views like Mihalčevs' open in public, Popov, however, had retreated from the debate already at an early stage.⁵⁴ He went on to collect anthropological material which – after the end of the Ancien Regime and after the ideological reorientation under the rule of the Bulgarian Communist Party – would be published in a posthumous monograph in 1959.⁵⁵

II. EUGENICS AND DEMOGRAPHIC POLICIES – A SHORT SURVEY⁵⁶

On 19 and 20 May 1922 at the instigation of the Direction of National Health the medical doctors of the rural administrative district of Petrič in the far South-West of Bulgaria met at a conference in order to discuss issues of healthcare. Apart from the danger of various infectious diseases penetrating into this border area and other pressing hygienic issues the conference also debated the “protection of the population against infection because of marriage and against the degeneration of the progeny” and decided:

The majority adopts the opinion that candidates for marriage should present the religious authorities a medical certificate *that they are healthy and may enter into matrimony*. If one or both sides suffer from diseases which may be passed on the progeny or may have effect on it for whatever reason, if they cannot present a medical certificate with the above mentioned contents, then the parties declare that both or one of them or both are ill, but without obstructing them in their will to enter into matrimony, if they insist to do so.⁵⁷

The suggestion of the majority of the conference was not realized, but the fact that the idea of a health certificate before marriage was discussed in a provincial conference of medical doctors, shows the topicality of eugenic thinking in Bulgaria after the First World War.

Already in the early 20th century the ophtalmologist Konstantin Pašev (1873–1961) had asked to take those factors into consideration which are responsible for inherited eye diseases.⁵⁸ The already mentioned biologist Stefan Konsulov even before the First World War was engaged to propagate Darwinism and the Mendelian Laws in the popular journal „Priroda“, so did also Metodij Popov in his textbook on biology in 1919.⁵⁹ Konsulov was also the first one who made eugenics to a subject of public discussion in Bulgaria. After a longer stay in postwar Germany he started to disseminate eugenic ideas in Bulgaria. He took the view that urban culture and civilization had invalidated „natural selection“, so that hereditary diseases and other negative qualities could be passed easily to the next generation. Hereditary diseases were to be found in marginal groups and in the lower classes who reproduced themselves with a high birthrate, while the fertility of the educated classes who formed the genetic treasure of the nation was poor. Therefore he asked for the introduction of eugenic measures like compulsory premarital counselling and medical examination of bride and groom which could lead to prohibition of marriage or at least of reproduction in case of hereditary diseases; and he also vehemently advocated compulsory sterilization of those with serious hereditary diseases. Women of the educated classes should not be allowed to study at Universities, to take positions in science or to become lawyers. They should rather stay at home and invest their “genetic treasure” by giving birth to many children in order to catch up with the birthrates of the lower classes. Konsulov further criticised those forms of medicine which compensated natural handicaps by devices like spectacles, so that short-sighted persons could reproduce themselves. Due to Konsulov medicine should solely act in a preventive manner.⁶⁰

Konsulov was undoubtedly influenced by German authors like Erwin Baur, Eugen Fischer and Fritz Lenz whose book on human genetics had become a bible for racial hygiene.⁶¹ But because of his efforts to adapt eugenics to the Bulgarian readership – Konsulov published two brochures on the “Laws of Heredity” and on “the Degeneration of Cultural Mankind” – he can be considered an original interpreter and observer of the German and international eugenic movement.⁶² A congenial person was the neurologist Ljubomir Ivanov Rusev (1898–?) who was assistant for hygiene at the Medical Faculty and, having specialised in neurology, later run his own private psychiatric hospital. Rusev published in 1925 in the journal of the Direction of National Health a seminal article on racial hygiene and later, in 1934, a fundamental work on the „Elementary Principles of Eugenics (Racial Hygiene)“.⁶³ Eugenic thinking became also a push by a cycle of lectures on the family, i.e. on the dangers modern society would impose on family. The lectures were held in 1924 and were organized by the Bulgarian Dermatological Society under the presidency of Bogomil Beron (1866–1936), the doyen of dermatology and venerology in Bulgaria.⁶⁴

What were the reasons for the sudden interest to discuss eugenic ideas in Bul-

garia? Without doubt they have to be sought in the general mood of crisis which had seized the intellectual elites of the country after the First World War: dreams of a Greater Bulgaria had remained unfulfilled; the country was full with refugees from Macedonia, Thrace and Dobrudja, a situation which over-strained the housing stock and reduced the already afflicted level of hygiene; the state budget was burdened with reparation payments; there was no return of to the certainties and the impression of safety which had distinguished the period before the years of war; the believe in traditional values was shaken, and the political situation was unstable. Shortly, the notion of „degeneration“, as expressed in Oswald Spengler's „Decline of Occident“, was part of a general mood among the educated classes in Bulgaria, and Eugenics tried to give an adequate answer which appeared to encapsulate the most recent insights into human biology.

Two times Konsulov and Rusev tried to rally like-minded colleagues in eugenic societies. The first one, the „Bulgarian Society for Racial Hygiene“ („Българско дружество за расова хигиена“), was founded in 1928. Also the young medical embryologist and zytologist Asen Ivan Hadžiolov (1903–1998) was among its activists. But the society soon passed away. The second foundation took place after the coup of the 19th of May 1934. The activists found the political situation now convenient to re-found the society as „Bulgarian Society for Eugenics“ („Българско дружество за евгеника“). They also acted under impression of the recent German eugenic legislation like the law for the prevention of hereditary diseased progeny of 1933 which had introduced compulsory sterilization. This time influential professors of the University of Sofia, like the already mentioned Stefan Vatev, the ophtalmologist Konstantin Pashev and the criminologist Nikola Saranov (1895–1974) supported the enterprise. But, as a matter of fact, the members of the society could not afford the further financing of its journal „Narod i potomstvo“ (Nation and Progeny) and had to stop their activities in late 1935.⁶⁵

Eugenic thinking surely had left its traces on the Law on National Health which was passed in 1929, but those paragraphs of the law which foresaw the possibility of premarital medical counseling were not put to practice, as Ljubomir Rusev pitifully observed in retrospect.⁶⁶ But the propagators of eugenics had more success – even after the demise of their society – in spurring demographic politics in Bulgaria: In the late 1930s Konsulov warned the Bulgarian public about negative consequences of decreasing birthrates.⁶⁷ The „Society for Hygiene and Preventive Medicine in Bulgaria“ („Дружество за хигиена и предпазна медицина в България“), which was headed by the leading Bulgarian hygienist Toško Petrov (1872–1942) and the already mentioned Dragomir Mateev, asked for a stronger persecution of illegal abortions and for a demographic legislation.⁶⁸ This was also the course of the „Ligue of Parents with many Children in Bulgaria“ („Съюз на многодетните в България“) founded at that time. In 1943 – after Bulgaria had become the ally of the Third Reich – the Minister of the Interior, Petâr Gabrovski,

indulged these demands and worked out the Law for Families with Many Children (Закон за многодетните семейства) which was passed in March 1943: it granted tax relief, state credits and other privileges to young couples who intended to produce more than two children. It also included eugenic regulations: it stipulated that the groom should not be over forty years of age; and in order to secure state credits, the spouses were obliged to undergo a compulsory premarital medical examination to ensure that neither had hereditary diseases.⁶⁹

The „Society for Hygiene and Preventive Medicine“ praised the law, but it also raised further demands: “It is the opinion of the society that we consider the sterilization of the socially inferior and harmful in our country a serious option. Sterilization should be organized in such a way that makes use of practical experience in countries where it has been introduced.”⁷⁰ But the further political development intercepted such a development; the Law for Families with many Children, however, was taken over by the regime of the Fatherland Front. In the early 1950s it was replaced by a Decree for the Stimulation of the Birthrate and Abundance of Children (Указ за насърчаване на раждаемостта и многодетството). Premarital medical examinations became compulsory in general during the 1960s.⁷¹

III. CONCLUSION

As in other modern nation states biopolitics in Bulgaria manifested itself in various subfields. Here only the areas of racial anthropology, and to a lesser extent, of eugenics and demographic policies have been (incompletely) treated. There has still much work to be done in order to evaluate other subfields like criminal anthropology, human genetics, the science of sexuality etc. In order to understand the challenges of modernity – and biopolitics without doubt belongs to them – it is necessary to investigate the transfer of knowledge from other countries and the adaptation of this knowledge to the situation of a Southeast European country like Bulgaria. German science appeared to be the main godfather for Bulgarian biopolitics, in particular during the period of the *Third Reich*; but it was not the only one, if we take into account the simultaneous activities of the Rockefeller Foundation in the field of health policy.⁷² A short look on the press reviews of Bulgarian medical journals further shows that they also carefully documented developments in neighboring countries like Yugoslavia and Romania.

Even if the state of research is incomplete, we can at least draw some preliminary conclusions: The propagators of biopolitics in Bulgaria were mostly scientists-experts who had to convince politicians and the public; it was their unspoken dream that society ought to be under their leadership-expertise: Racial anthropologists claimed to have the last word in assessing who was really Bulgarian and who not, while racial hygienists and demographic experts would take care for the production of a large quantity of healthy Bulgarians, a process which not acciden-

tially reminded on the economic production of commodities which was likewise measured in quantity and quality. It is exactly this thinking which interprets the role of the national state as “a gardening state” (Zygmunt Bauman).⁷³ It is the advantage of Foucault’s approach, however, that he does not seek the location of power and its technologies only in the state and its apparatus. His approach allows to discuss the influence of science as an independent power structure. It influences society by its various discourses; they are slowly disseminated and seep into the thinking and acting of the ordinary people – vestiges of this process can be found in textbooks, manuals for practical courses for the population⁷⁴ and finally also in laws. By this way the propagators of biopolitics, be they representatives of racial anthropology or of eugenics meant to work for the “embetterment” of the own nation; but simultaneously they also contributed to the establishment of the “own”, the “normal” and the “healthy” one vis-à-vis the “other”, the “abnormal” and the “sick” one. That’s how biopolitics works: Lucky the one who was on the right side of their assessments, but damned, if “incurable” and “incorrigible”, the other ones!

NOTES

- ¹ This article is a result of the projects MOEL 063 and MOEL 140 funded by the Austrian Research Association (ÖFG) in 2004 and 2006.
- ² Cf. Мишел Фуко, *Надзор и наказание. Раждането на затвора*. С., 1998.
- ³ There is still no Bulgarian translation of these lectures available for the moment.
- ⁴ Michel Foucault, *Society Must Be Defended. Lectures at the College de France, 1975–1976*. London, 2003, 254–255.
- ⁵ Cf. George L. Mosse, *Towards the Final Solution. A History of European Racism*. New York, 1978.
- ⁶ Cf. Rainer Mackensen (ed.), *Bevölkerungslehre und Bevölkerungspolitik vor 1933*. Opladen, 2002; Rainer Mackensen (ed.), *Bevölkerungslehre und Bevölkerungspolitik im „Dritten Reich“*. Opladen, 2004.
- ⁷ Cf. Gisela Bock, *Zwangssterilisation im Nationalsozialismus*. Opladen, 1986; Peter Weingart/Jürgen Kroll/Kurt Bayertz, *Rasse, Blut und Gene. Geschichte der Eugenik und Rassenhygiene in Deutschland*. Frankfurt am Main, 1988; Paul Weindling, *Health, Race and German Politics between National Unification and Nazism 1870–1945*. Cambridge, 1989; Mark B. Adams (ed.), *The Wellborn Science. Eugenics in Germany, France, Brazil, and Russia*. New York – Oxford, 1990; Stefan Kühl, *Die Internationale der Rassisten. Aufstieg und Niedergang der internationalen Bewegung für Eugenik und Rassenhygiene im 20. Jahrhundert*. Frankfurt am Main – New York, 1997.
- ⁸ Cf. Foucault, *Society Must Be Defended*; the Bulgarian translation is: Мишел Фуко, *Трябва да защитаваме обществото*. С., 2003.
- ⁹ Cf. Мишел Фуко, *История на сексуалността*. Т. 1. С., 1993.
- ¹⁰ Cf. Giorgio Agamben, *Homo Sacer: Sovereign Power and Bare Life*. Stanford University Press, 1998.
- ¹¹ Cf. Martin Stingelin (ed.), *Biopolitik und Rassismus*. Frankfurt am Main 2003; Edward Ross Dickinson, *Biopolitics, Fascism, Democracy: Some Reflections on Our Discourse About “Modernity”*, *Central European History* 37/1 (2004), 1–48.

- ¹² Cf. in selection: Вера Давидова, *История на здравеопазването в България*. С., 1956; Вера Павлова (ed.), *История на медицината в България*. С., 1980; Миладин Апостолов, *История на медицината*. С., 1984; Миладин Апостолов (ed.), *Измерения на българската медицина*. С., 2001.
- ¹³ Cf. Иван Еленков, Расовите белези на „българското“ в търсене на българската културна идентичност между двете световни войни, *Усвояване и еманципация. Встъпителни изследвания върху немската култура в България/Aneignung und Emanzipation. Einleitende Forschungen über deutsche Kultur in Bulgarien*, ed. Атанас Натеv. С., 1997, 305–318; Георги Каприев, Българският спор за расизма през 30-те години на XX век: философски и общокултурни перспективи, *ibid.*, 329–342; Димитър Денков, Към историята на идеологическите моди в България, *ibid.*, 343–354, Алехандър Къосев, Расизъм in potentia?, *ibid.*, 355–368; Иван Еленков, *Родно и дясно. Принос към историята на несбъднатия „десен проект“ в България от времето между двете войни*. С., 1998, 126–131; Гергана Мирчева, *Страданията на тялото и душата в нормативни режими на достъп по публичността (изследване на българското законодателство от края на XIX век до Втората световна война)*. Diploma thesis, С., 2003; Гергана Мирчева, Българският евгеничен проект от 20-те и 30-те години на миналия век и нормативният код на „родното“, *Критика и хуманизъм* 17/1 (2004), 207–221; Румен Даскалов, *Българското общество 1878–1939*, vol. 2. С., 2005, 42–135. Милена Ангелова, В „единен противотуберкулозен фронт“. Борбата против туберкулозата в социалната и здравна политика на българската държава – 1944–1951. *Тероризъм. Интелектуализъм. Балкански безпокойства*. Благоевград, 2005, 134–145.
- ¹⁴ John Beddoe, *The Anthropological History of Europe. Being the Rhind Lectures for 1891. Revised to Date*. Paisley, 1912, 86–87.
- ¹⁵ Cf. a short selection of anthropological research on the Bulgarians: R. Virchow, Tabelle mit den Massen von 5 Bulgarenschädeln, *Verhandlungen der Berliner Gesellschaft für Anthropologie, Ethnologie und Urgeschichte* 1873. *Zeitschrift für Ethnologie* 5 (1873), 94–97; J. Kopernicki, Sur la conformation des cranes Bulgares, *Revue d'Anthropologie* 4 (1875), 68–96; John Beddoe, On the Bulgarians, *The Journal of the Anthropological Institute of Great Britain and Ireland* 8 (1879), 232–239; H. H. Howorth, The Spread of the Slaves. Part IV: The Bulgarians, *The Journal of the Anthropological Institute of Great Britain and Ireland* 11 (1881–1882), 211–267; Beddoe, *Anthropological History*, 81–89; William Z. Ripley, *The Races of Europe. A Sociological Study*. New York, 1899, 421–422.
- ¹⁶ A noteworthy exception for the German example is: Andrew Zimmerman, *Anthropology and Antihumanism in Imperial Germany*. Chicago – London, 2001.
- ¹⁷ И. Бассанович, Материали за санитарната етнография на България I. Ломският окръг (1880–1889), *Сборник за народни умотворения, наука и книжнина* 5 (1891), 3–186, esp. 26–32, 38–40.
- ¹⁸ Vatev mistakenly describes 1897 as the year of the exhibition – cf. Ст. Ватев, *Принос към антропологическо изучаване на Българите*. б.м. б.д. [1900] (=off print from the journal „Български преглед“ vol. 6/ no. 4), p. 1.
- ¹⁹ Cf. *ibid.*, 1–2.
- ²⁰ Cf. Д-р. С. Ватев, Антропологическо изследване на България. *Български преглед* 5/1 (1898), 148–152, esp. 151.
- ²¹ My translation; *ibid.*, p. 148.
- ²² Cf. *ibid.*, p. 150.
- ²³ Cf. С. Ватев, *Принос към антропологическо изучаване*, с. 1.
- ²⁴ Cf. State Archive of the City and District of Sofia, ф. 3к, оп. 1, а.е. 38, „Протокол на възобновителното събрание на д-вото за расова хигиена“, 28 November 1934. I got this document by courtesy of Dr. Kristina Popova.
- ²⁵ Cf. С. Ватев, *Принос към антропологическо изучаване*, 2–4; on Virchow's investigations

- cf. Andrew Zimmerman, Anti-Semitism as skill: Rudolf Virchow's Schulstatistik and the racial composition of Germany. *Central European History* 32/4 (1999), 409–29.
- ²⁶ S. Wateff, Anthropologische Beobachtungen an den Schülern und Soldaten in Bulgarien, *Correspondenz-Blatt der deutschen Gesellschaft für Anthropologie, Ethnologie und Urgeschichte* 32/4 (1901), 29–30.
- ²⁷ Cf. С. Ватев, Принос към антропологическо изучаване, р. 3.
- ²⁸ Cf. Wateff, Anthropologische Beobachtungen an den Schülern und Soldaten in Bulgarien, р. 30.
- ²⁹ Cf. S. Wateff, Anthropologische Beobachtungen der Farbe der Augen und der Haut bei den Schulkindern von Türken, Pomaken, Tataren, Armenier, Griechen und Juden in Bulgarien, *Correspondenz-Blatt der deutschen Gesellschaft für Anthropologie, Ethnologie und Urgeschichte* 34/7–8 (1903), 58–60.
- ³⁰ Cf. Ст. Ватев, *Антропология на Българите*. С., 1939.
- ³¹ Cf. С. Ватев, Значението на антропологичните наблюдения върху ученците, *Български преглед* 6/7 (1900), 68–85.
- ³² С. Юринич, Забележка към антропологичните изследвания за „Българско Отечество“. *Български преглед* 6/5 (1900), 117–118; С. Ватев, Значението на антропологичните наблюдения върху ученците; С. Юринич, За значението на антропологичните наблюдения върху ученците. *Български преглед* 6/8 (1900), 115–120; С. Ватев, Още един отговор на забележките на г. Юринича по антропологическите наблюдения над ученците. *Български преглед* 6/9 (1900), 100–105.
- ³³ My translation; С. Ватев, Още един отговор, р. 104.
- ³⁴ Cf. С. Ватев, Значението на антропологичните наблюдения върху ученците, 10–11. The first attempt in this direction was made by M. Mihajlov – cf. М. Михайлов, Материали за физическото развитие на български ученик. *Периодическо списание на Българското книжово дружество в София* 14 (1903), 341–366.
- ³⁵ Cf. Петър Неделски, Програма за медико-антропометричните наблюдения над учените. *Училищна хигиена* 2/7 (1906), 114–118, esp. 117.
- ³⁶ Cf. П. М. Нойков/Д. Т. Кацаров, *Физиологически прояви на половото съзряване у българските ученици и ученички*. С., 1919; С. Ватев, Появата на първата менструация у българските жени. *Списание на БАН* 32/клон природо-математичен 15 (1925), 69–77.
- ³⁷ Cf. М. Балан, Изследвания върху българското женско корито. *Годишник на Софийския университет IV. Медицински факултет* 26 (1936–1937), 321–344, esp. 341.
- ³⁸ Cf. Central Historical State Archive, Sofia, ф. 372к, оп. 2, а.е. 6: Доклад за 1935/36 учебна година от Д-р Драгомир Матеев, главен инспектор-лекар.
- ³⁹ S. Wateff, Anthropologische Beobachtungen der Farbe der Augen, der Haare und der Haut bei den bulgarischen Schulkindern in der europäischen Türkei. *Correspondenz-Blatt der deutschen Gesellschaft für Anthropologie, Ethnologie und Urgeschichte* 33/3 (1902), 23–24.
- ⁴⁰ Cf. В. Кънчов, *Македония. Етнография и статистика*. С., 1900.
- ⁴¹ Cf. Krum Drontschilow, Metrische Studien an 93 Schädeln aus Kamerun. *Archiv für Anthropologie*, new series 12 (1913), 161–183.
- ⁴² Cf. Krum Drontschilow, *Beiträge zur Anthropologie der Bulgaren*. Braunschweig, 1914, р. 32.
- ⁴³ Cf. Крум Дрончилов, Материали за антропологията на българите. I. Македонските българи. *Годишник на Софийския университет I. Историко-филологически факултет* 17 (1920–1921), 133–197, esp. 137, 166.
- ⁴⁴ My translation; Крум Дрончилов, Принос към антропологията на албанците. *Списание на БАН* 21/клон природо-математичен 10 (1921), 111–134, esp. 127.
- ⁴⁵ Adherents of the old approach were the geographer Dimităr Jaranov (1909–1962) and, again, Stefan Vatev – cf. Дим. Яранов, Антропометрични изучавания на населението в Разлог. *Македонски преглед* 7/4 (1932), 25–46; Ст. Ватев, Български типове в антропологическо

- отношение. *Сборник в чест на Анастас Иширков по случай на 35-годишнината му професорска дейност*. С., 1933, 139–147; Ст. Ватев, Антропологическо изучаване на Ловчанско. *Ловеч и Ловчанско* 6 (1934), 88–99. The two articles of Vatev did not contain new material, but where only a presentation of the results of his measurements from the turn of the century.
- ⁴⁶ Cf. Chr. Seisow, Rassenforschung und Rassenpflege in Bulgarien. *Rassen im Donaauraum*, ed. Johann Gaspar, 1/1, Budapest, 1935, 3–7.
- ⁴⁷ Cf. P. Ganef, Über die Blutgruppen der Bulgaren. *Zeitschrift für Rassenphysiologie* 7 (1935), 43–46; N.N., *Расовият облик на българите*. s.d., s.1 [1937?], 19–29.
- ⁴⁸ Cf. *Расовият облик на българите*, pp. 31, 37–38.
- ⁴⁹ Cf. *ibid.*, 45–47, 53–55.
- ⁵⁰ Cf. Еленков. *Родно и дясно*.
- ⁵¹ Cf. H. Barten, Rassenkundliche und bevölkerungspolitische Fragen in Bulgarien. *Zeitschrift für Rassenkunde* 5/9 (1939), 65–67, esp. 64–65.
- ⁵² Cf. Никола Алтънков, *Нарекоха ги фашисти*. С., 2004, с. 267.
- ⁵³ Методий Попов, *Българският народ между европейските раси и народи*. С., 1938; Методий Попов, *Наследственост, раса и народ*. С., 1938.
- ⁵⁴ The whole event and the discussion is already treated by research – cf. А. И. Хаджиолов, Акад. Методий Попов като антрополог. Методий Попов, *Антропология на българския народ*. I. *Физически облик на българите*. С., 1959, 5–18, esp. 8–10; В. х. Вълчанов, *Пътят на Методий Попов. Опит за кратка биография*. С., 1963, 84–96; М. Апостолов, Академик Методий Попов – създател на българската биологична школа. *Из историята на естествознанието в България*, (ed.), М. Апостолов. С., 1982, pp. 138–170, esp. 149–151, 165–166; Вълчан Христов Вълчанов/Ботю Атанасов Ботев, *Очерк за Методий Попов*. С., 1989, 83–100; Еленков, *Расовите белези на „българското“*; Каприев, *Българският спор за расизма*; Денков, *Към историята на идеологическите моди в България*; Кьосев, *Расизъм in potentia*; Еленков. *Родно и дясно*, 126–131. Nevertheless an extensive and detailed re-evaluation of the events will be necessary, but this cannot be done within the limitations of an article, but will have to find its place within the framework of a major analysis of bio-politics in Bulgaria until 1944.
- ⁵⁵ С. Попов, *Антропология на българския народ*.
- ⁵⁶ For a more detailed treatment of Bulgarian Eugenics cf. Мирчева, *Българският евгеничен проект* and Christian Promitzer, *Taking Care of the National Body: Eugenic Visions in Interwar Bulgaria 1905–1940. Blood and Homeland. Eugenics and Racial Nationalisms in Central and Southeast Europe, 1900–1940*, ed. Marius Turda/Paul J. Weindling. Budapest et. al. 2006, 223–252.
- ⁵⁷ My translation; Central State Archives, Sofia, ф. 372^к, оп. 1, а.е. 583, fol. 39b.
- ⁵⁸ Cf. Константин Пашев, *Хигиена на окомото*. С., 1905, 42–43.
- ⁵⁹ Cf. С. Консулов, *Наследствеността и нейните закони*. *Природа* 14/5 (1908), 82–85; С. Консулов, *Механизъм на наследствеността*. *Природа* 18/1 (1912), 12–16; С. Консулов, *Менделеевият закон за наследствеността*. *Природа* 20/2 (1914), 35–36; Методий Попов, *Обща биология: Лекции*. С., 1919, 360–487 *passim*.
- ⁶⁰ Konsulov has published these thoughts in a variety of articles mainly in the journal *Природа*; here we can only quote an incomplete selection: С. Консулов, *Менделизъм*, *Природа* 22/7–8 (1922), 98–101; С. Консулов, *Биологичното развитие на народите*. *Природа* 24/1 (1923), 1–2; С. Консулов, *Подобренето на човешките раси*. *Природа* 24/3 (1923), 33–34; С. Консулов, *Лична, обществена и расова хигиена*. *Здравна просвета* 3/20 (1924), 1–2; С. Консулов, *Жената и наука*, *Слово* 5/1241 (30.7.1926).
- ⁶¹ Erwin Baur, Eugen Fischer, Fritz Lenz, *Menschliche Erblchkeitslehre und Rassenhygiene*, 2 vol. München, 1921.
- ⁶² Cf. С. Консулов, *Изразждането на културното човечество. Борба с изразждането*. С., 1928; С. Консулов, *Законите за наследствеността. Наследственост при човека*. С., 1930.

- ⁶³ Cf. Люб. Ив. Русев, Биологични основи на расовата хигиена. *Известия на Дирекция на народното здраве* 10/10–11 (1925), 435–453; Люб. Ив. Русев, Задачи и средства на расовата хигиена. *Известия на Дирекция на народното здраве* 10/12 (1925), 525–538; Любомир Ив. Русев, *Основни принципи на Евгениката („Расова хигиена“)*. С., 1934.
- ⁶⁴ Българско дерматологическо дружество (ed.). *Лекции върху семейството (държани през месеците февруари и март 1924)*. С., 1924.
- ⁶⁵ Cf. Българско д-ство за евгеника. *Народ и потомство* 1/1 (1935), с. 3; State Archive of the City and District of Sofia, ф. 3к, оп. 1, а.е. 38: „Протокол на възобновителното събрание на д-вото за расова хигиена“, 28. November 1934 (I am grateful to Kristina Popova for making this document available for me).
- ⁶⁶ Cf. Русев, *Основни принципи на Евгениката*, с. 73.
- ⁶⁷ Cf. С. Консулов. Най-голямата опасност за българския народ – неговото стопяване. *Просвета* 3/7 (1938), 794–808; С. Консулов, Стопяването на българския народ. *Мир* (17.5.1938); for the demographic situation in Bulgaria in that period cf. Кристина Попова, *Националното дете. Благотворителната и просветна дейност на Съюза за закрила на децата в България 1925–1944*. С., 1999, 42–52, 62–63.
- ⁶⁸ Cf. Из научните дружества. *Български хигиенен преглед* 9/1 (1939), 55–67.
- ⁶⁹ Cf. *В Борба за потомство. Две парламентарни речи по закона за многодетните семейства*. С., 1943; Закон за многодетните български семейства. *Известия на Главната дирекция на народното здраве* 28/260 (1943), 211–219.
- ⁷⁰ Българско дружество за хигиена и предпазна медицина – Изложение. *Български хигиенен преглед* 12/3 (1943), 88–90.
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- ⁷² Cf. Милена Ангелова, Рокфелеровата фондация и американската Близкоизточната фондация – инициативи в полето на социалната работа, 20–30те години на XX век. *Обществено подпомагане и социална работа в България. История, институции, идеологии, имена*. Благоевград, 2005, 112–125.
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- ⁷⁴ Thus the first lesson of the official manual of the “Practical Course on Maternity, Childhood and Household” of 1939, which was approved by the Main Direction of National Health and by the Supreme Medical Council, treated genetics and racial hygiene – cf. *Практически курс по майчинство, детство и домакинство*. С., 1939, 7–9.

THE ROMA IN POST-COMMUNIST BULGARIA

YORGOS CHRISTIDIS

Introduction

The position of the Roma communities in post-communist Europe has been drawing growing attention due to their deteriorating living conditions and their growing marginalisation from society: "While Roma have historically been among the poorest people in Europe, the extend of the collapse of their living conditions in the former socialist countries is unprecedented", noted a report commissioned by the World Bank in 2003¹. In post-communist Bulgaria, it has been widely accepted that the country has successfully re-integrated the Turkish minority, a notable success, given both the assimilation campaign carried out against the Turkish minority in the 1980s and the tragic events that took place in ex-Yugoslavia in the 1990s. Bulgaria's successful "ethnic model"² however has failed to include the substantial Roma minority³. The following article will attempt A) to analyse the growing impoverishment and marginalisation of the Roma in Bulgarian society and the reasons behind it, and B) the evolution of Bulgaria's post-1989 policy towards the Roma.

A. The growing impoverishment and marginalisation of Roma in Bulgarian society and the reasons behind it

By the end of the 1990s it had become pretty obvious that Roma' standards of living had sharply deteriorated in Bulgaria. A number of Bulgarian and international analyses were underlining the dramatic drop in the Roma' standards of living that took place during the 1990s in all spheres of social life:

On *unemployment*: there has been a soar in unemployment and long-term unemployment rates among the Roma. According to a representative regional survey in nine Roma neighbourhoods in 1999–2000, unemployment levels there were as high as 80%; 26% of the adult Roma have never been employed; 21% have been unemployed for more than ten years; 34% have been unemployed from five to nine years; 11% for two to four years⁴. According to World Bank data, in 2001, the unemployed among the Roma had reached 70%⁵.

On the *housing conditions*: an increasingly large number of Roma live in illegally constructed houses, in poor conditions, that have limited access to public services. On the basis of a countrywide survey conducted in 2000, "approximately 70% of the houses in Roma neighbourhoods countrywide were built "illegally",

i.e. either outside of the municipal borders or without appropriate authorization papers”⁶. In big urban neighbourhoods, the share of illegal construction reached 80%⁷.

On *education*: there has been a deterioration of the anyway low educational attainment of Roma. The proportion of children who drop out of school at an early age or who have never enrolled in school rose from 11.2 in 1992 to 14.9 in 2000. At the same time, the number of Roma with higher education that was particularly small anyway, declined even further, from 0.3 in 1992 to 0.16 in 2000⁸. According to a survey in August 2000 of the, at least, 100,000 Bulgarian children of school age who did not attend school 30 percent were Roma⁹. Another survey, in October 2000, put the share of the Roma children who drop out between grades one and seven at 80 percent. The high drop out rate is a direct cause of high rates of illiteracy among Roma: according to estimates in April 1998, as much as 25 percent of the Roma population was illiterate”¹⁰.

On *poverty*: there has been a drastic rise in poverty rates in segregated Roma neighborhoods. According to World Bank data for 2001, poverty among the Roma was ten times as frequent as among the Bulgarians¹¹. As has been aptly described: “A sizeable part of the Roma now live in extreme poverty – in shanties with no access to electricity, drinking water, sewage and heating in winter”¹².

On their *general health*: there has been a constant trend of deteriorating health, of a growing part of the Roma population. According to a survey conducted in 1994, 44% of Roma families included at least one chronically ill member and 13% included a disabled member¹³. Furthermore, “Bulgarian Roma not only suffer from generally poorer health than the population as a whole, but do not enjoy equal access to either health care or social assistance”¹⁴. According to a FACT Agency survey, 17% of the Roma households do not have a personal doctor (GP) and 46% do not have a personal dentist¹⁵. In addition, reforms introduced in the Bulgarian health system in mid-1999, concerning compulsory health insurance, made things even worse for the Roma: “The new system requires every employed Bulgarian citizen to contribute six percent of his/her income and register with a “Personal Physician”. For unemployed and other non-earners, the contribution is covered by municipal and state budgets. However, residents of some Roma neighborhoods are not present on official social welfare lists, either because they have moved without registering or because they have dropped out of the welfare system altogether. As a result they are ineligible for any kind of social support, including health insurance”¹⁶.

The Roma in addition face a number of other socio-economic problems: *Growing dependency* on social assistance: a 2000 survey revealed that 63.5 percent of the Romani households surveyed depended on social assistance to survive¹⁷; *Disruption of family ties*: surveys show that more and more young Bulgarian Roma fathers are leaving their families¹⁸; *Growing isolation of the residents*

of segregated neighbourhoods: “excluded from the labour market, with no access to health care, education and social assistance, the Roma are having less and less opportunities for contacts with the members of “the other” communities. Often a significant part of the women and children do not leave the ghetto for years”¹⁹; *Deterioration of the social organization in Roma neighborhoods*: “the possibilities of the residents of segregated neighbourhoods to cultivate in the young generation strong motivation for education and success, to exercise effective control over the behaviour of their members and especially over youths, and to form positive social attitudes in them, are declining. Conversely, the manifestations of the culture of poverty, with its typical orientation towards survival and neglect of possibilities for development are increasing”²⁰.

And in that respect, of the widespread culture of poverty and lack of positive social values prevailing over the Roma in Bulgaria, the absence of political activism among them is probably one of the most striking examples. In post-1989 Bulgaria the Roma community has shown incapable of mobilizing itself in order to fight for its interests and improve its lot, despite its numeric strength. Constitutionally, of course, that is not feasible given the existing prohibition: under Art.11(4) the organization of political parties along ethnic and religious lines is prohibited. A similar provision is included in the Law on Political Parties. However, despite the post-1990 constitutional and other legal provisions the Turkish minority did manage to organize and legalise its own political party. Although a number of Roma MPs have been elected on the lists of mainstream parties since 1990, as a non-governmental Organisation’ (NGO) report underlined, “the Roma community is not represented in proportion to its share of the Bulgarian population, and Roma MPs seldom dare to push for Roma political interests”²¹. At the end of the 1990s, two main Roma NGOs stood out in representing Roma’ interests: The *Kupate Roma Public Council* (KRPC) and the *EuroRoma Association*. KRPC was established in 1997, and held its first congress on 16 September 1998. Its priority was on social policy and employment, and during the tenure of the *Union of Democratic Forces*’ (UDF) government of Ivan Kostov, associated itself closely with the ruling party. The *EuroRoma Association* was founded on December 12, 1998. It gave priority to the protection of civil rights and settlement of the problems of the Roma, and has associated itself with the *Euroleft*²². It was only in 1999, that Roma organizations succeeded in their efforts to develop a common platform, “a rare success story in the Roma political participation”. And in April 2002, 11 Roma NGOs established a “Roma Parliament”²³.

There was little doubt then, that by the end of the 1990s the Bulgarian Roma were suffering from large-scale poverty and social exclusion. Social exclusion “refers to a process of social separation between individuals and society” and can have multiple dimensions: economic, political, sociocultural and geographic²⁴. “In economic exclusion, individuals cannot participate in market activity, includ-

ing employment, access to credit, and land. Political exclusion refers to limitations on participation in democratic processes, such as voting, participation in political parties and other associations within civil society. Sociocultural exclusion encompasses separation based upon linguistic, religious, and ethnic grounds. Geographic exclusion involves various types of spatial differentiation"²⁵.

Concerning the reasons behind Roma's social exclusion, negative stereotypes and widespread discrimination practices against them appeared to have played a central role²⁶. In post-1989 Bulgaria there have been surveys revealing widespread negative stereotypes and hostility towards the Roma²⁷, something that has been also verified by more recent surveys. A survey conducted in 2005 revealed extensive anti-Roma stereotypes: some 86% of the respondents defined Roma as "lazy and irresponsible", while 92% said that they had "criminal tendencies"²⁸. In another recent nationwide survey conducted among 1,112 people, there were similar findings: To the question "Would you agree (would you or would you not accept) to live in the same country with Roma people (Gypsies)? More than a quarter of Bulgarian respondents (27%) answered negatively; Three quarters of those interviewed responded negatively to the question of whether they would vote for a candidate nominated by their Party, if the candidate was Roma; While 82%, 74% and 76% of those questioned would not accept a Roma as a local police chief, an army officer and a government minister respectively²⁹.

There is probably a combination of factors behind such sentiments, including Bulgaria's difficult post-1989 economic conditions, feelings of social insecurity and aspects of Roma culture and living conditions. In that respect, it is illustrating that "the poverty of many Roma communities contributes to resentment as Roma are perceived as dependent on welfare benefits and burdens on the state"³⁰.

On the problem of discrimination against Roma in post-communist Bulgaria, NGO's have been particularly vocal in stressing its significance. In its 2001 report on "Minority Protection in Bulgaria", the *Open Society Institute* for example underlined that "despite constitutional and certain legislative prohibitions against discrimination in Bulgaria, there exists widespread discrimination against Bulgarian Roma in access to employment, education, health care, housing and social welfare and in the criminal justice system. Illegal and racially motivated use of force by both law enforcement officials and private groups and individuals is common"³¹. *Open Society Institute* and others have provided a series of examples of such discriminatory practices against Roma in various areas:

On the problem of high unemployment, the reasons usually suggested for it by officials in the 1990s included low education and work qualifications. "However, there is little doubt that racial discrimination too plays a significant role in the availability of work to Roma. Roma were generally dismissed during the first wave of unemployment to hit Bulgaria, between 1991–1993, while ethnic Bulgarians, or sometimes Bulgarian Turks, with similar qualifications retained their jobs.

According to a survey in October 2000, only 5.1 percent of Roma attribute their unemployment to their poor education; 65.8 percent claim that the real reason is ethnic discrimination³².

On the problem of education: First of all, Roma children who live in segregated Roma neighbourhoods attend schools that are poorly equipped and offer pedagogical programmes of inferior quality, compared to schools in non-Roma neighbourhoods. Secondly, there has been an overrepresentation of Roma children into "special schools": "Since the early sixties a growing number of Roma children have been absorbed into an expanding system of boarding schools, some of which are "special schools" for mentally retarded children. In October 2000, there were approximately 130 such special schools in Bulgaria, with more than 19,000 students attended primarily by Roma. There are two types of special schools for mentally retarded children: primary schools for non-severe mental retardation and Special Educational Professional Institutions"³³. There is a third category of "special schools" in which Roma children are over represented: schools for delinquent children: in 2001, minorities constituted about 65 percent of all children in these schools, and in some they reached up to 85–90 percent of pupils³⁴.

On the poor housing conditions: "many Roma report discriminatory treatment in the delivery of paid public services to their neighbourhoods, because many Roma neighbourhoods are formally outside city boundaries, municipal authorities often offer either curtailed municipal services or none at all"³⁵.

On the ghettoization of the Roma community. "The growing hostility of the Bulgarians towards the Roma, which is compelling many Roma who can afford to live elsewhere to prefer to build houses "in their own neighbourhood", is also contributing to the phenomenon"³⁶. And even more worrying, "Roma are sometimes subject to enforced separation through the construction of physical barriers, such as metal or concrete fences around their neighbourhoods"³⁷.

In April 1999, the Bulgarian government of Ivan Kostov explicitly acknowledged the existence of discrimination against the Roma:

In a socioeconomic aspect, the status of Roma is on the whole drastically lower than the average in Bulgaria: high rate of unemployment, poor housing conditions, high-rate of illiteracy. Those permanent characteristics of the state of the Roma community are external manifestations and direct results of, *inter alia*, discriminatory treatment³⁸.

It was an acknowledgement that accompanied the introduction of measures aiming at fighting discrimination and facilitating the integration of Roma into Bulgarian society, as we will see in the next chapter.

There can be little doubt that negative stereotypes and discrimination have played an important role in the growing social marginalisation of the Roma in Bulgaria, as elsewhere in former Eastern Europe. From an ideological point of view however, the Roma' predicament could be seen also in relation to the post-

1989 dominance of the neo-liberal discourse in former Eastern Europe and its economic and social ramifications. Neo-liberalism dominated transition politics in ex-Eastern Europe, including Bulgaria. In its context, "Communism's collapse appeared as the final confirmation of the inevitable failure of state-centered modernization approaches based on public ownership, planning and protectionism"³⁹. The state lost its central role for the modernization and development of society in favour of the market. The so-called "Washington consensus", with its "holy trinity" of rapid stabilization, liberalization and stabilization became the essence of the reform policies that all former Eastern European states were called to implement. It is illustrating, that between January 1990 and April 1995, twenty-four transition countries followed a stabilization programme dictated by the so-called "Washington consensus"⁴⁰. Reform policies however, that not only proved particularly controversial in terms of delivering a better standard of living, as has been aptly documented⁴¹, but in the process of implementation, the state found itself in a position where it could not deal effectively with the emerging poverty and social inequalities. And the state's weakening has been particularly harmful for the most vulnerable groups in society like the pensioners or the Roma community.

In Bulgaria, reform policies introduced after 1989 have produced some of the most disappointing economic and social results in the whole of ex-Eastern Europe. It is indicative that from 1989 to 1994 Bulgaria's GNP dropped by 44% while per-capita income of the population decreased by 57%⁴². Cataclysmic economic changes that have produced a deep socioeconomic crisis: "in post-communist Bulgaria de-industrialization, unemployment, poverty, growing income disparity, mass emigration, crime and corruption have reached alarming proportions"⁴³. And while whole social groups like the Roma found themselves impoverished and unable to cope with their predicament, the state was drastically weakened: "With the fall of Communism, the erstwhile glorification of the party-state has been replaced by anti-state nihilism, resulting in a deepening crisis of all state institutions, the breakdown of state capacity and general ungovernability"⁴⁴. So it's not incidental that NGO's and others dealing with Roma issues in Bulgaria, have in fact been arguing for a more interventionist state: "The problem is that unemployment for more than two years causes processes of demotivation and depression, and loss of training and disciplinary skills, which means that reintegrating those people requires additional funds and efforts. Unemployment for more than five years brings about serious changes in the motivation for everyday work, and re-employment becomes extremely difficult... The problem is that when unemployment in a particular community exceeds 30% and lasts more than two years, this leads to processes of degradation with which the community cannot cope on its own. The need arises of an active policy on reintegration in the various social spheres"⁴⁵. And such a policy can be exercised primarily by the state; the market cannot substitute the state in its social functions and obligations.

B. The evolution of Bulgaria's post-1989 policy towards the Roma

It is widely acknowledged that until 1999, none of the post-1989 governments had developed a comprehensive policy for dealing with the deteriorating position and living conditions of the Roma community. Those measures that were introduced, failed because among others, "they were not harmonized with the Roma community, who therefore remained indifferent to them"⁴⁶.

Thus, since 1994, the Council of Ministers has included various advisory bodies dealing with issues and concerns of the ethnic minorities. In 1994, the *Interdepartmental Council on Ethnic Affairs* was established by the Council of Ministers; an advisory body that was never, however, convened⁴⁷. One year later, in 1995, the new *Bulgarian Socialist Party* (BSP) government under Zhan Videnov, established the *National Council on Social and Demographic Issues* (NCSDI), as an advisory body representing not only ethnic communities, but also organizations of the disabled, the pensioners and women. The way NCSDI dealt with problems of the ethnic minorities was criticized as reflecting "the traditional approach of pre-1989 governments to ethnic minority issues in Bulgaria: problems faced by minorities were regarded as primarily social problems, rather than as problems caused by ethnic discrimination"⁴⁸. On January 30, 1997, the Council published a "Programme for the Resolution of the Problems of Roma" in Bulgaria as an integral part of the "National Programme for Social Development"⁴⁹. The programme however, was never implemented as a few days after its adoption, the BSP government resigned⁵⁰.

During this period, and in particular at the time of Zhelyu Zhelev's Presidency, August 1990 – November 1996, there was a special advisor to the President on national-ethnic issues and religious denominations⁵¹. Judging from the results, his practical significance in advancing solutions for the Roma community must be regarded as doubtful.

In December 1997, the new UDF government of Ivan Kostov established the *National Council on Ethnic and Demographic Issues* (NCEDI), in charge of looking after the interests of both ethnic minorities and Bulgarians abroad. According to Article 1 of the Rules of Organization and Procedure, the Council is "a body for consultations, co-operation and coordination between government bodies and nongovernmental organizations, designed to formulate and implement national policy on ethnic and demographic issues and migration"⁵². The members of NCEDI included representatives of ten government ministries at the level of deputy minister and of four state institutions represented by their directors. Thirty-two non-governmental organizations (NGOs) are also participating in NCEDI, twenty-one of which are Roma⁵³. NCEDI initiated in 1999 the formation of regional councils on ethnic and demographic issues as consultative bodies to the regional governors⁵⁴. An important problem however that emerged with the regional coun-

cils was that as of October 2001, there was “no law or other regulation providing for their function and powers”⁵⁵. In addition, by 2003, almost half of Bulgaria’s 263 municipalities had appointed municipal experts on ethnic and demographic issues⁵⁶.

The most important initiative of the NCEDI however, concerned the adoption on April 22, 1999, of the *Framework Programme for Equal Integration of Roma in Bulgarian Society*. The Framework Programme explicitly recognised the existence of discrimination against the Roma and set as a “strategic goal” the eradication of the unequal treatment of Roma: “*Elimination of discrimination against the Roma should become one of the main political priorities of the Bulgarian state*”⁵⁷. The Framework Programme includes a number of recommendations in various spheres of public life that should be adopted for a period of ten years⁵⁸:

- On discrimination a) the introduction of effective legislation on Protection against Discrimination and b) the establishment of a Public Authority for the prevention of discrimination,
- On economic development, the introduction of measures on employment, social assistance and land allocation, in order to improve their standard of living
- On health care, a) tightening sanitary controls and b) intensifying health education programmes,
- On the spatial development of Roma neighbourhoods, the legalisation of housing,
- On education, a) desegregation of Roma schools, b) elimination of the practice of sending healthy children of Roma origin to special schools, c) counteracting against forms of racism in the classroom, d) providing opportunities for the study of the Romani language at schools, e) facilitating the enrollment of Roma students in universities and f) introducing literacy and training programmes for adult Roma,
- On the protection of the ethnic specificity and culture of Roma, the development of Roma culture as a specific ethnic culture and, at the same time, as part of Bulgarian national culture,
- On Roma presence in the national media, the participation of both broadcasting of Roma programmes and inclusion of Roma journalists in Bulgarian National Television and Radio, and finally
- On the Roma women, the promotion of culture for their full-fledged individual, social and economic participation in public life.

The Framework Programme undoubtedly represented a positive step forward, in terms of government policy. However, as of October 2001, very few legislative measures had been taken to ensure implementation of the Programme. Specifi-

cally, it was claimed that, "there is no corresponding plan for implementation of the Programme and no mechanism for requiring the necessary commitment of staff or resources on the part of different government Ministries"⁵⁹.

Following the formation of the new Bulgarian government of Simeon Saxcoburgotski, in June 2001, a new impetus was given to the policy dealing with the Roma. The fact that Bulgaria had entered into accession negotiations with the European Union (EU), and that the latter was urging it to alleviate the Roma' predicament was an additional pressure on the Bulgarian government. In its 2002 Regular Report on Bulgaria, the EU Commission was openly critical on the issue of the Roma:

As reported in previous years, Bulgaria has a good Framework Programme on integration of minorities targeted at the Roma. Regrettably, however, this has not been put into practice. There has been very little change in the situation of the Roma minority since the last Regular Report, and there are no significant developments in their socio-economic situation and living conditions to report. Roma continue to suffer from social inequalities due to the accumulation over time of factors that have worsened living conditions... Discrimination, and cases of violence against members of the Roma community continue to be reported. This situation needs to be addressed urgently⁶⁰.

The Report was highlighting the absence of any significant progress made in areas such as employment, legalisation of Roma' housing, health care and desegregation of Roma education and was urging for the adoption of "comprehensive anti-discrimination legislation"⁶¹.

In addition to the need to adopt an effective anti-discrimination piece of legislation it was also becoming clear that a specific action plan had to be adopted in order to implement the Framework Programme of 1999. As the new Chairwoman on NCEDI, Filiz Husmenova, appointed on 17 July 2003, would point out: "the problems of minorities are grave and they are not problems of today or of yesterday but of many years. Unfortunately, the efforts made so far for their overcoming, though significant, have not led to very encouraging results... There are quite serious problems in the regions where Roma population is predominating... The Framework Programme for Equal Integration of Roma into the Bulgarian Society adopted in 1999 is a good document but it is of general character..."⁶².

On September 16, 2003, the Bulgarian parliament adopted the *Protection from Discrimination Act*, that had been elaborated under the NCEDI' supervision. It was an important step forward in the development of the national legal framework for the protection from discrimination on ethnic basis by establishing an independent body with sufficient powers to investigate cases of alleged discrimination and to impose sanctions⁶³.

Furthermore, on October 6, 2003, the Bulgarian government with its Decision No 693 adopted the *Action Plan for the Implementation of the Framework*

Programme for Roma Integration. The Action Plan was elaborated by the Bulgarian government with the participation of the *Roma Parliament*, an association of Roma organizations established in April 2002. It includes a number of specific measures in a number of different fields with the objective of effectively implementing the Framework Agreement⁶⁴.

In the course of 2004, the government adopted some specific measures in the field of education. It was decided to provide breakfasts, warm milk and free textbooks to about 300,000 children in the first through fourth grades, as well as to invest 10 million leva towards improving the level of Bulgarian language skills, providing transportation to the secondary schools and lowering the drop-out rate⁶⁵. Measures which although were not announced specifically for the Roma school children were expected to have a beneficial effect also on them. In July 2004, the Minister of Education and Science approved a strategy for the educational integration of minority children and students while it was also decided to set up a special fund for the implementation of the strategy⁶⁶.

NGO's have continued to watch closely government policy on the Roma, keeping a highly critical eye over its implementation⁶⁷. There has also been Roma displeasure with government policy. On the eve of the ceremony on the *International Decade of Roma Inclusion 2005-2015*, which was organized in Sofia on February 2, 2005, sixty-three Roma leaders published a declaration criticizing "the government's formal attitude towards its own promises with regard to helping the Roma minority to overcome discrimination and isolation"⁶⁸. And during the following day, there was a Roma' demonstration in front of the National Assembly against discrimination, the first mass Roma anti-discrimination demonstration held since 1989⁶⁹.

On May 13 and 14, 2005, at a conference organized by the Roma NGO *Human Rights Project*, 142 Roma experts from the regional and municipal administrations signed an open letter to Prime Minister Simeon Saxcoburgotski, in which they claimed that the Framework Program for Equal Integration of the Roma into Bulgarian Society "was not being fulfilled. They called upon the government to undertake the genuine fulfillment – rather than just on paper – of this program document, to take steps toward multilateral consultations with the Roma community on Roma integration issues, and to extend real, rather than just consultative, powers to Roma representatives... on ethnic and demographic matters"⁷⁰.

The last government initiative on Roma, before the national elections in June 2005, was also criticized. Specifically, in the context of the *Decade on Roma Inclusion* a special working group of the Saxcoburgotski' government formulated an *Action Plan for Achieving the Goals of the Decade of Roma Inclusion*. Although the plan was greeted as containing "many laudable measures... which could significantly ease, if not resolve completely, problems related to healthcare, employment, education and the hygiene and infrastructure in the Roma neigh-

bourhoods... the great majority of these measures are only good wishes, because the Bulgarian budget's funding for them is minimal"⁷¹. A total of 37,622,000 Euros is envisioned for the entire ten-year period⁷².

Conclusion

The "Roma issue" has emerged as one of the most serious ones facing Bulgaria in its post-communist transition. A far from negligible part of Bulgaria's population has been living in growing circumstances of poverty and marginalisation. Except from the obvious social and economic consequences of the exclusion of Roma there are also obvious political dangers. The marginalisation of the Bulgarian Roma feeds the agenda of political demagogues and populists that have targeted the Roma at a time when Bulgarian society is going through an acute economic, social and demographic crisis⁷³, as it was illustrated by the electoral success of the xenophobic and openly racist political organization *Ataka* in the parliamentary elections of 2005. The *Ataka* political party and his leader espoused a virulent anti-Semitic, anti-Turkish and anti-Roma political message⁷⁴ managing to attract 7% of the votes, most of whom middle-aged men from the cities, with a significant proportion of them having university education⁷⁵.

The Roma however have become victims not only of negative stereotypes and discrimination but they have also paid a steep price for the ideological dominance of neoliberalism in the transition period, which has generated a deep economic recession and has dictated the predominance of the market at the expense of the state. The state's de facto post-1989 weakening has proved particularly harmful for the Roma who appeared unable to cope with the rigours of the free-market economy. The Roma's predicament has revealed the need for a more active, interventionist state in the economic and social sphere that will address effectively the problems that have accumulated since 1989. Since 1999, successive Bulgarian governments have introduced a number of policy measures, seeking to improve the Roma' socio-economic status. Measures that could make a difference on the Roma' position if only properly implemented⁷⁶.

NOTES

- ¹ Dean Ringold, Mitchel A. Orenstein and Eric Wilkens, *Roma in an Expanding Europe: Breaking the Poverty Cycle*, published by the World Bank, in 2003, in preparation of the conference "Roma in an Expanding Europe: Challenges for the Future", held in Budapest, June 30 – July 1, 2003.
- ² Bakalova Maria, "The Bulgarian Ethnic Model. Legal framework and Policy Aspects" in Goedele De Keersmaecker, Plamev Makariev (Ed.) *Bulgaria. Facing Cultural Diversity*, IPIS in cooperation with ACCESS, (July 1999), 14–54. For the successful re-integration of the Turkish minority see also Ragaru Nadege, "I Voulgaria endeka xronia meta: I tipiki periptosi

mias evropaikis valkanikotitas”, in *I Epanakapsi ton Valkanion*, (Agra: Athens, 2004), 165–172, *Le Retour Des Balkans*, Editions Autrement, 2003, translation into Greek from French by Irini Tsokaleli, Anna Tsea.

- ³ According to the December 1992 census, 313,326 persons identified themselves as Roma in a total population of 8,472,724. A number however, that was deemed as too low, since even the Interior Ministry’ figures for 1992 estimated that there were more than 550,000 Roma in the country. According to the census of March 2001, 370,908 persons identified themselves as Roma in a total population of 7,928,901. However, according to experts’ estimates an addition of 350,000 preferred to identify themselves as Turks, Bulgarians, and in a small percentage as Romanians, although they “share the same social characteristics, typical for the majority of the Roma population”. For the 1992 census see Makariev Plamen, “Introduction”, in *Bulgaria. Facing Cultural Diversity*, p.8. For the 2001 census see “Information about the policy of the Government of the Republic of Bulgaria on Improving the situation of Roma population in Bulgaria”, *Newsletter*, National Council on Ethnic and Demographic Issues, 2003, p. 26.
- ⁴ Tomova Ilona, “Problems of the Roma in Bulgaria”, in *Bulgaria-Yugoslavia. Journalism in Intercultural Dialogue* (ACCESS, Sofia, 2002), p. 134.
- ⁵ Cited in “Information about the policy of the Government of the Republic of Bulgaria on Improving the situation of Roma population in Bulgaria”, op.cit., p. 26.
- ⁶ In some of the biggest urban neighbourhoods, the proportion is even greater: in the Roma neighbourhoods of Sliven, between 90 and 100 percent of Roma houses are illegal; the figure is 80 percent in Stara Zagora and in Shumen; 85 percent in Blagoevgrad; 90 percent in Kurdzhali; and over 80 percent in Lovech. *Minority Protection in Bulgaria*, Open Society Institute, 2001, p. 94.
- ⁷ “Information about the policy of the Government of the Republic of Bulgaria on Improving the situation of Roma population in Bulgaria”, op.cit., p. 26.
- ⁸ Tomova, op.cit., p.138.
- ⁹ *Minority Protection in Bulgaria*, op.cit., p. 86.
- ¹⁰ Ibid, p. 87.
- ¹¹ Tomova, op.cit., p. 136.
- ¹² Ibid, p. 135.
- ¹³ *Minority Protection in Bulgaria*, op.cit., p. 91.
- ¹⁴ Ibid, p. 90.
- ¹⁵ Tomova, op.cit., p. 139.
- ¹⁶ *Minority Protection in Bulgaria*, op.cit., p. 92.
- ¹⁷ “Social integration of the Roma population in Bulgaria”, report prepared for the United Nations Department for Economic and Social Affairs, October 2000, cited in *Minority Protection in Bulgaria*, op.cit., p. 92
- ¹⁸ Tomova, op.cit., p. 139.
- ¹⁹ Ibid, p. 139.
- ²⁰ Ibid, p. 139.
- ²¹ *Minority Protection in Bulgaria*, op.cit., p. 109.
- ²² Yaneva Maria, “System of Central and Local Government, Political Participation and Civil Participation of Minorities in Bulgaria”, in *Bulgaria – Facing Cultural Diversity*, p. 66.
- ²³ See “Parliament Roma”, *Newsletter*, National Council on Ethnic and Demographic Issues, 2003, 34–35.
- ²⁴ Ringold, Orenstein, Wilkens, op.cit., p. 18.
- ²⁵ Ibid.
- ²⁶ According to the famous British sociologist Anthony Giddens, stereotypes, “involve categories of thought by means of which we classify our experience”. When stereotypes are associated with anxiety or fear then they are “commonly infused with attitudes of hostility or hatred towards

the group in question..." Prejudice operates mainly through the use of stereotypes. "Prejudice refers to opinions or attitudes held by members of one group about another... it involves holding preconceived views about an individual or group, often based upon hearsay rather than direct evidence, views which are resistant to change even in the face of new information... someone who is prejudiced against a particular group will refuse to give them a 'fair hearing'. People may have positive prejudices towards groups of people they like and negative prejudices against those who dislike. Prejudice is very often at the basis of discrimination, although the two may exist separately. "Discrimination refers to activities which serve to disqualify the members of one grouping from opportunities open to others". Giddens Anthony, *Sociology* (Blackwell: Cambridge, 1989, Reprint 1991). Ibid, 245–247.

- 27 See for example the survey conducted among Bulgarians on "attitudes towards people from different nations", the attitude towards the Roma is the most negative among different social categories (Pupils, Students and the Employed). The survey is cited in Mitev Petar-Emil, "Europe, the Europeans and the European Values in the eyes of young people in Bulgaria (1)", in Mitev Petar-Emil (ed.) *Bulgarian Youth Facing Europe*, International Centre for Minority Studies and Intercultural Relations (Sofia, 1999), 14–15. Also illustrating are the results of three surveys conducted respectively in 1992, 1994 and 1997, that registered a high level of prejudice against the Roma. For the surveys see Kanev Krassimir, "Changing Attitudes Towards Ethnic Minorities in Bulgaria and the Balkans", in Thanasis Sfikas, Christofer Williams (ed.), *Ethnicity and Nationalism in East Central Europe and the Balkans* (Ashgate: Aldershot, 1999).
- 28 Survey conducted by political scientist Petar-Emil Mitev, cited in Shkodrova Albane, "Comment: Nationalism Retains Grip on Bulgaria's Youth", *Balkan Crisis Report*, *Institute for War and Peace Reporting*, No 555, 11 May 2005, www.iwpr.net/index.pl?archive/bcr3/bcr3_200505_555_6_eng.txt, downloaded 18/5/2005.
- 29 "Interethnic Attitudes, Social Distances and Values Orientations", Nationwide Survey of Bulgarians Aged 18-70 conducted by BBSS Gallup on behalf of the Bulgarian Helsinki Committee. Cited in Cohen Emil, "The data indicate: Our society is ill from racism", *Obektiv*, Issue 123, April-July 2005, www.bghelsinki.org/obektiv/2005/123/123-01.pdf, downloaded 5/12/2005.
- 30 Ringold, Orenstein, Wilkens, op.cit., p. 18.
- 31 *Minority Protection in Bulgaria*, op.cit., p. 77.
- 32 Ibid, p.96.
- 33 Ibid, p.88.
- 34 Ibid, p.89. A relevant issue concerns the study of the Roma language in schools. The Bulgarian Constitution provides for the study of the "mother tongue" and Decree No.183 of the Council of Ministers from 5 September 1994 allow "for languages other than Bulgarian to be taught as an "obligatory selectable subject" – i.e. as one of a limited number of core subjects of study – in municipal schools from grades one to eight, four times weekly, where a minimum of eleven students wish to study it". However, Roma children do not exercise their constitutional right to study their mother tongue. In 1990-1991, a number of Romani language studies were established; according to some estimates, the total number of Roma children studying the Romani language reached 4,000. "However, courses were not organized or supported systematically, and no measures were taken to ensure provision of teaching materials, teaching standards, or the harmonization of mother tongue classes within the broader educational plan. As a consequence, the number of Roma children studying in the Romani language had gradually decreased to zero by 1999". Ibid, 106–107.
- 35 Ibid, p. 93.
- 36 Tomova, op.cit., p. 133.
- 37 Plovdiv's "Sheker Mahala", Kazanlak's Roma neighbourhood and the Roma neighbourhood in Kiustendil are surrounded by two-meter high fences paid for by the respective municipalities. *Minority Protection in Bulgaria*, op.cit., p. 94. There are of course and other areas where Roma

have encountered discrimination practices since 1989. One of the most notable concerns the dispensation of justice: "there are widespread allegations that Roma receive differential treatment within the Bulgarian criminal justice system, including disproportionately high rates of arrest and placement in pre-trial detention, larger periods in pre-trial detention and harsher sentencing". op.cit., p. 97.

- 38 "Framework Programme for Equal Integration of Roma in Bulgarian Society", *Newsletter*, National Council on Ethnic and Demographic Issues, 2003, p. 19.
- 39 Bonker Frank, Muller, Klaus, Pickel Andreas, "Cross-Disciplinary Approaches to Postcommunist Transformation", in Frank Bonker, Klaus Muller (edit.), *Postcommunist Transformation and the Social Sciences*, (Rowman, Oxford, 2002), p. 5.
- 40 Ibid, p. 8.
- 41 Postcommunist Eastern Europe and Central Asia are among those regions in the world that have experienced the sharpest increase in poverty. Ibid, p. 14.
- 42 Rossen Vassilev. "De-development Problems in Bulgaria", *East European Quarterly*, XXXVII, No.3, September 2003, p. 354.
- 43 Ibid, p. 345.
- 44 Ibid, p. 353.
- 45 Tomova, op.cit., p.134, p. 66..
- 46 Yaneva, op.cit., p. 57.
- 47 *Minority Protection in Bulgaria*, op.cit., p. 113.
- 48 Ibid.
- 49 "This programme focused mainly on the social problems faced by the community, such as poverty, poor education, bad hygiene, and inadequate housing, without touching on either racial discrimination or deficiencies in the protection of minority rights". *Minority Protection in Bulgaria*, op.cit., p. 114.
- 50 Ibid, p. 113.
- 51 Mihai Ivanov, who in 2003 became Secretary of the National Council on Ethnic and Demographic Issues.
- 52 "National Council on Ethnic and Demographic Issues: Structure and Functions", *Newsletter*, National Council on Ethnic and Demographic Issues, 2003, p. 2.
- 53 All major ethnic groups living in Bulgaria are represented in the Council. Thus, apart from NGOs representing Roma, Turks, Armenians and Jews, one sees NGOs representing Vlahs, Aromanis, Karakachans, Crimean Tatars and Greeks living in Bulgaria. Ibid, p. 3.
- 54 As of 2003 there were 22 such regional councils. The councils include regional administration experts, municipal mayors, representatives of territorial units of central government, regional providers of communal services, representatives of non-profit associations and minority nongovernmental organizations employed in the respective sphere, as well as municipal experts on ethnic and demographic issues. Ibid, p. 6.
- 55 *Minority Protection in Bulgaria*, op.cit., p. 114.
- 56 "National Council on Ethnic and Demographic Issues: Structure and Functions", op.cit., p. 6.
- 57 "Framework Programme for Equal Integration of Roma in Bulgarian Society", *Newsletter*, National Council on Ethnic and Demographic Issues, 2003, p. 19.
- 58 Ibid, 19–24.
- 59 *Minority Protection in Bulgaria*, op.cit., p. 115.
- 60 *2002 Regular Report on Bulgaria's Progress Towards Accession*, Commission of the European Communities, Brussels, SEC(2002) 1400, 9/10/2002, p. 32.
- 61 Ibid, 32–33.
- 62 "National Council on Ethnic and Demographic Issues: Structure and Functions", op.cit., p. 7.
- 63 In addition, the *Protection from Discrimination Act* was "providing a broad definition of the scope of protection" and was "reversing the burden of proof from the victim to the perpetrator". *Human Rights in Bulgaria in 2003*, Annual Report of the Bulgarian Helsinki Committee,

www.bghelsinki.org/annual/en/2003_human%20rights.word downloaded 5/12/2005.

⁶⁴ The Action Plan includes 27 specific measures on *Protection against Discrimination*, 5 on *Social Services and Protection*, 5 on *Employment*, 8 on *Health Care and Sport*, 3 on *Housing*, and 8 on *Institutional Strengthening*. See "Action Plan for the Implementation of the Framework Programme for Roma Integration", *Newsletter*, National Council on Ethnic and Demographic Issues, 2003, 35–40.

⁶⁵ *Human Rights in Bulgaria in 2004*, Report of the Bulgarian Helsinki Committee, April 2005, p.16, www.bghelsinki.org/annual/en/2004_human%20rights.pdf, downloaded 5/12/2005.

⁶⁶ A fund that was established by government decree in January 2005, as a majority of MPs had rejected the draft law for the establishment of the fund, on October 6, 2004, "citing populist and even racist arguments". Ibid, p. 16.

⁶⁷ According to the *Bulgarian Helsinki Committee*, "only cosmetic changes were undertaken in 2004 to overcome the discrimination and isolation suffered by the Roma community, mostly geared toward making a show of action for the benefit of international organizations. No legislative changes were made for promoting the Roma integration into Bulgarian society. As in previous years, there was practically a lack of any state policy aimed at Roma integration. This minority group's exclusion from societal processes, discrimination, educational segregation, lack of adequate access to justice, poverty and poor hygiene conditions continued to characterize the position of Roma in Bulgaria in 2004". Furthermore, the government decree in December 2004 to transform NCEDI into a *National Council for Inter-Ethnic Co-operation* although welcomed in principle it was being criticized as limiting "the opportunities for Roma NGOs to influence policies affecting the Roma community, since NGO representation was sharply reduced on the new council". Ibid, 15–16.

⁶⁸ Ibid.

⁶⁹ Ibid, p. 17.

⁷⁰ Ibid.

⁷¹ Ibid, p. 16.

⁷² Ibid.

⁷³ In 2000, Bulgaria had a negative natural growth rate of – 0.7 percent and a total fertility rate of 1.1 children per woman. With replacement fertility being 2.1 children per woman, Bulgaria is characterized by what demographers call "lowest low fertility", and had the lowest fertility rate of any European country between 1995 and 1997. According to United Nations projections, Bulgaria's population, which stood at around 7.9 million in 2001, will shrink by 31 percent in 2050, the second steepest decline in all Europe. To the problem of low fertility we have to add the exodus of Bulgarians from the country. Estimates range from 500,000 to 800,000. Ghodsee Kristen, "Brain Drain, Bogus Asylum Seekers, and Babies: Conflicting Discourses of Mobility and Fertility in Bulgaria and the European Union", *Anthropology of East Europe Review*, Vol.20, No.2, <http://condor.depau.edu/~rrotenbe/acer/v20n2/Ghodsee.pdf#search=Balkan%20Emigration>, downloaded 5/12/2005.

⁷⁴ During his pre-election campaign, conducted under the motto "No to Turkification! No to Gypsification", the leader of the Ataka party, Volen Siderov, produced a series of seven programmes on the Roma in the private television channel SKAT TV, "In them he tried to suggest that Bulgarians were the object of criminal "Gypsy terror" – that they were being murdered, robbed, beaten and raped daily by an alien minority in their own country and were not getting any protection from the law enforcement authorities, who had united with the Roma against the Bulgarians because they are the employees of a corrupt anti-Bulgarian ruling class". Kanev Krassimir. How should we think of "Attack"? *Obektiv*, Issue 123, April–July 2005, www.bghelsinki.org/obektiv/2005/123/123-02.pdf, downloaded 5/12/2005.

⁷⁵ Ibid.

⁷⁶ Assessment by a member of the Bulgarian Helsinki Committee (BHC), shared with the author of this paper, during a discussion in the offices of BHC on 6/01/2006.

BULGARIAN TRANSITION PERIOD

Case of Sofia – from Architectural Point of View

DANIELA RANKOVIC

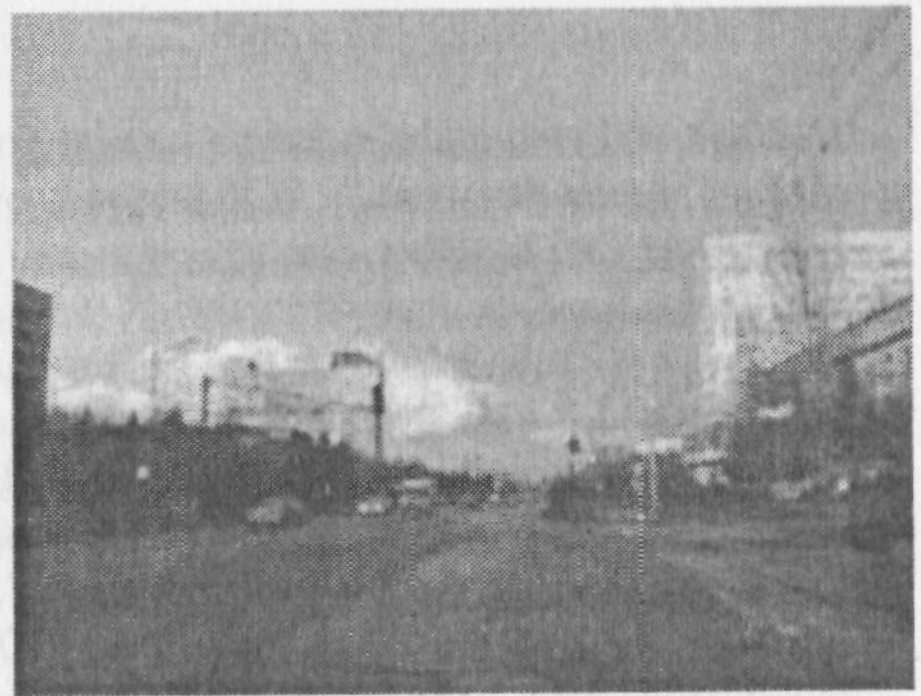
When I let these spaces and their content have an effect on me then I see everything very clearly. This is beauty – this is truth. We can have different opinions about it, but all who will ever see these spaces will sooner or later realize that this is a real masterpiece.*

Fritz Tugendhat, 1931

The Thracians called it Serdica, Byzantines – Triaditsa and the Slavs – Sre-dets, but since the 14th century it has been well known as Sofia, important stop on the Roman path from the old Naisus (today Nis in Serbia&Montenegro) to Istanbul. It stands before us as a city with a number of cultural layers; more than a million inhabitants, many contrasts and hundreds of reasons why we should deal with the question of its fast development, continuous constructing work underway and rapid modifications of its urban shape. After many years of stagnation and



Representative building



Wide boulevard

isolation Bulgaria will finally become a member the European Union and that is a great obligation. Wide boulevards, representative buildings, great parks as an inseparable part of the city matrix are a background for what we today call a contemporary architecture. But in fact, it is a reflection of expressed impressions and

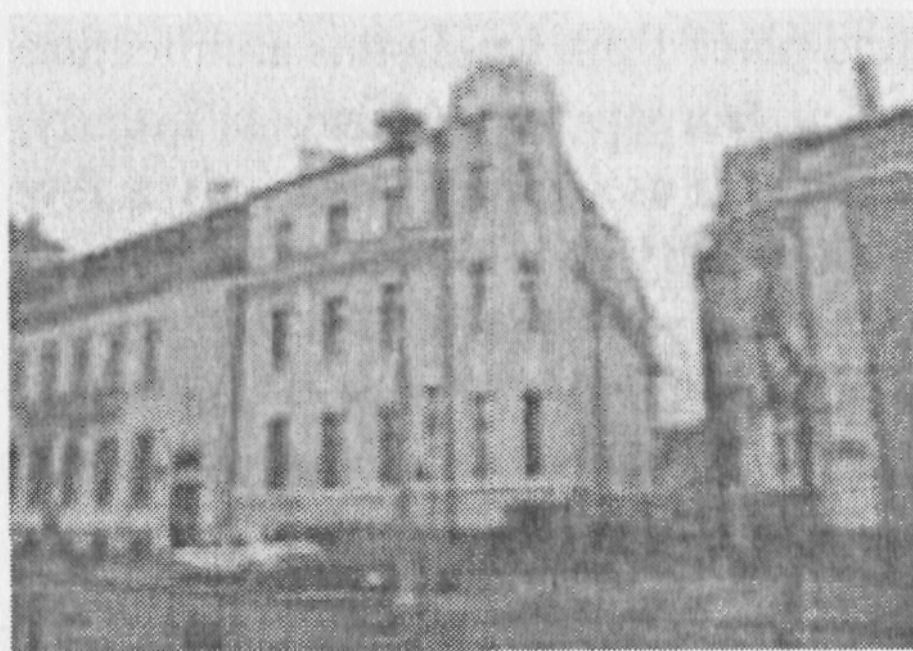
* Fritz Tugendhat was textile manufacturer from Brno. He lived and worked in the first half of the XX century. He said this when he saw the Tugendhat house which was built by famous German architect Mies van der Rohe for his family.

accumulated energy of its inhabitants, time and place from which this architecture has risen. The city's spirit and its environmental organization have, as usually, been first felt in the city's architecture. We say this as visiting Sofia only a few years ago meant seeing the city looking almost exactly as it looked in the second part of the nineteenth century, and in the first decades of the post WW2 period. Those hard years can still be recognized in shabby facades of many a buildings, dark and forgotten alleys and back yards as well as in visibly impoverished dwellers of these lodgings – this all depriving the city of its full splendor. Twentieth century has somewhat stretched the meaning of a cultural monument idea to encompass everything which is a material track of cultural or social importance, everything that refers to people's lives, fun, habitation, infrastructure, industry, trading; good and bad, which resulted in variety of styles and imbalanced quality of today's architecture. That is why this text should be a short call for attention, an attempt to stop for a while, to reconsider and ask, who, how and in what way has influenced Sofia's urban development, but first and foremost question would be to identify what is to be deemed as a step forward and what as a step backwards.

Mass construction and reconstruction or story without a beginning and without an end

Unlike many European cities which, just as Sofia, have had problems with infrastructure and supra-structure, and which have not allowed the city to spread endlessly in their attempts to improve the situation, Sofia has allowed this and it has been gaining in size every day on, which has resulted with the disproportionately large number of buildings of an unequal quality. The process of restoration of buildings and blocks is being carried out quite slowly. All in all, the old part of Sofia, or at least parts in which some restoration works have been done (and that too selectively, namely, only a few individual building involved) is today the part of the city where people live and work and there is no division between a business and/or residential part. Mass construction has led to the fact that Sofia at the beginning of the new millennium resembles Berlin in the 90's according to the number of open construction sites, as if the city started its birth process all over again.

The past times architecture is being slowly reconstructed and the future one ...contemporary architecture is being set everywhere even when there is no real need for it. It is impossible to stop the process where market requirements are above any other. Finally, it's a great transition law and processes of globalization – the ultimate path for every country entering European Union. New is being built beside the old and that fills this city with contrasts. That's why sometimes it's hard to imagine how this "face" looked when it didn't have "wrinkles". Or, has the mass construction just led us to the fact that processes of revitalization and



Reconstruction and revitalization of cultural heritage

reconstruction of cultural heritage seem so slow and beyond the reach compared to ever faster cropping out of new buildings. Old buildings often get a new look which could be approved of or criticized – all at the same time. In the end, there's something in this city that make us feel comfortable and cozy, something that is a way beyond architectural designs as master pieces, something that simply is the city's spirit. And it is exactly this fact that fosters certain anxiety over future: will this heritage be pledged and eventually disappear in the process of transition and globalization. I wonder if it is actually possible for the East to survive West?!

All those behind the city's picture

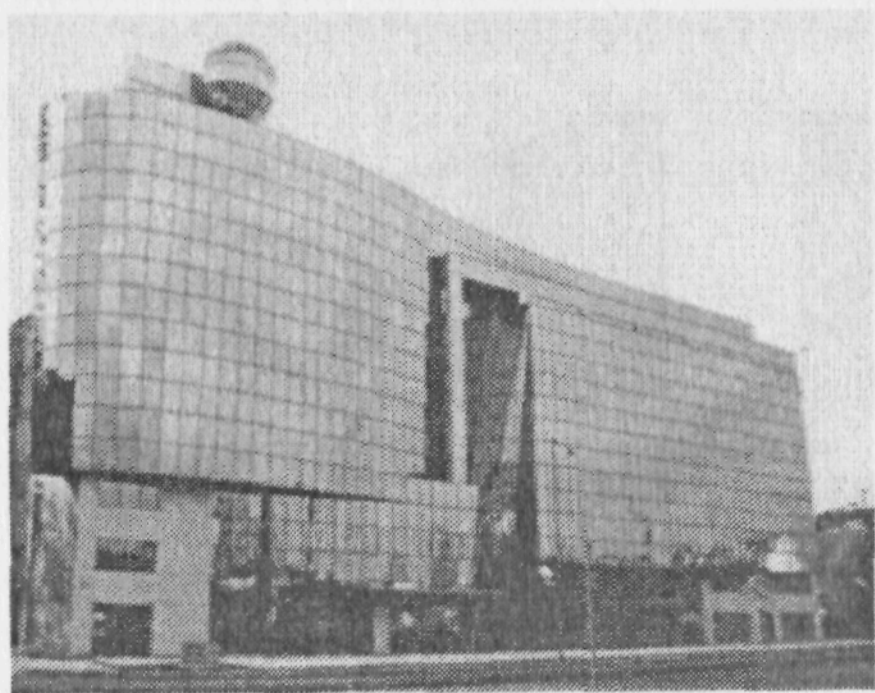
Bulgarian architecture at the crossroads of the two millennia should be considered in a much wider context. Apparently there were justifiable reasons to presume that the city's development would take a somewhat chaotic perspective and that the city will spread out without a genuinely regulated system. There have been just too many poor quarters, financial speculations and much of incoherent construction. It is widely hoped here that some of these things will not be repeated in the future. And this is important, because Sofia plays a significant role in preserving of legacy dating from times before the twentieth century. It is hard to conserve everything which has not been adapted to suit contemporary needs but is important to remember how valuable this architecture is for the city's overall urban and architectural expression.

This valuable treasure of earlier period Bulgarian architects is a really important and essential «gift» for the coming generations. Thanks to new opportunities Bulgarian architecture today has a number of styles and trends almost equal to the number of authors. Market requirements opened the door to many architects which resulted in an uncountable number of architectural offices but serious and mentioning-worthy firms are still very few. But as everyone gets the chance to build everyone has also the possibility to create a new image of Sofia

or at least some part of it - although with somewhat mixed results: some add to its beauty while some interfere with it. And if their responsibility is great than the responsibility almost equal is the responsibility of those who write about the city's architecture. That is why one can find quite a number of magazines and journals on the market that deal with construction, criticism, beautifying and regulation of municipal spaces, to begin with the magazines The House, The Details, Amc Aspects and New Home up to the magazine Architecture, which is the magazine of the Association of Architects of Bulgaria that has recently celebrated a significant jubilee – fifty years since the publishing of its first issue. Since the magazine Architecture has witnessed many a turmoil in the local world of architecture thus leaving a significant indentation for the future generations, it is considered the most valuable reading in this field of research. It covers architectural projects, architectural theory and history, criticism, but it also gives us important insight into Balkan architecture in general. Its writers say that it is very important to them to see where the Bulgarian architecture stands and this kind of putting things into perspective helps them understand how they rank.

Where is Sofia at the beginning of the new millennium

The city is where its people are and if the word 'Sofia' means 'wisdom' in Greek there is a hope that people would succeed to it and be able to make the beginning of this new millennium to look as a step forward, and not backwards in context of its changing. And while the city's architectural pearls appear to be somehow tucked in as if enveloped by the very places they are located on, the first impression one gets is a view on the city's transportation ties such as its Bus and Railway stations, or even perhaps the Metro station – these thus representing the city's architecture. Business centers, shopping malls and, of course, banks, are mushrooming almost on daily basis while the city's public use areas have not been touched yet and it is obvious that here lie a number of problems waiting to



First East International Bank

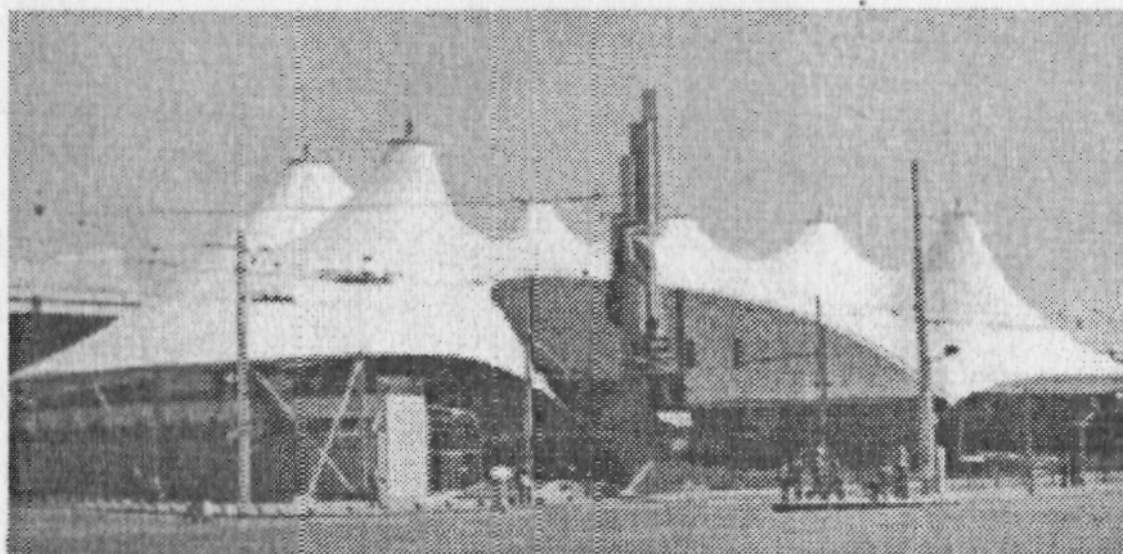


Sofbuild Business Building – city pearl

be solved. Consequently, a street lamppost, a park bench or a park itself have not still been identified as worthy of architectural consideration and be kept as one is accustomed to keeping one's house. Luckily, a real huge green areas are still the city's greatest asset and adornment. Perhaps human hands, work and good will do everything people can do but they can not do impossible, and as late Professor Dr. Ranko Radovic once said „urban culture is being built much harder and at much slower pace than houses are“.

**“Missed opportunities” in Bulgarian architecture
or just being apprehensive that bad solutions
of the past may be repeated again**

A few articles written by well known Bulgarian architect and professor at the University of Architecture, Civil Engineering and Geodesy in Sofia, Stefan Popov entitled «Bulgarian Architecture: Missed Opportunities» have been followed with a great interest and have raised a lot of questions. One of those questions was: “Will some of huge architectural oversights committed in the sixties and seventies be reflected on architectural designs of today and if so with which differentiating features and consequences?”. For example, the international competition for the Sofia's railway station best design was won by a German architect with a superior up-to-date project of European standing. It wasn't built. Unfortunately, due to intrigues and false patriotism, a very poor version of this project was built, which looks confusingly obsolete today. An analogous situation happened with the first prized project for the Opera House and House of Culture. So, we wonder will the mass construction and hastiness of modifying city urban silhouette result in the same, “miss opportunities”, but this time, of the new age. I'm fearful about how we are going to remember this marquee construction in front of the main entrance of the railway station. It is larger and taller than the main building and it resembles Munich Olympic days, leaving thus enough space for new criticisms. Also, are we going to look at the new Bus station, after some



Marquee construction in front of the main entrance of the railway station New Bus station

years, as a maximum or a minimum of the moment. It has been anticipated for such a long time, raising now as a phoenix from the ashes, and indeed, Bulgarian people needed it. No doubt that the start of the new millennium and Bulgaria's access to European ways will have resulted with many new requirements why we will in the future after this increase in construction deem the architecture of today as the time of "missed opportunities".

New millennium Sofia can become a piece of art but also a cheap copy. For those who are able to recognize it beauty is reality but what is objectively true?!

NOTE

This research was done for the article that was published in Serbian Magazine of Architecture called DaNS in April 2005. in issue number 49. The title was *Sofia at the beginning of the new millennium: a step forward or a step backward.*



TEACHING OF THE BULGARIAN HISTORY ABROAD. THE U.S. CASE

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Synopsis

Conveying and dispersing information in the information age. Attracting attention to specific issues and competing with information overload on a global scale. In 24x7, customer-service culture, customer service is the expectation, not an exception. How does history (as part of humanities) of Bulgaria (as part of a severely neglected geographical region) fit in the curricula of U.S. educational institutions? Understanding the specifics of the U.S. education, the characteristics of the Millennium generation and the driving forces behind education in the 21st century must be the departure point for plotting a strategy to successfully recruit students to learn such narrowly focused entities as Bulgarian history.

Introduction

"I want to encourage a more cosmopolitan sense of being an American, to have us recognize the historical interconnections that have made America's history global history even as it is national, provincial even as it shares in the general history of human beings on this planet."

Thomas Bender, history professor.

Teaching of Bulgarian history abroad can prove a rather complex and challenging venture. The complexity of the issue is based on a wide variety of aspects and possibilities. Faculty background is one important factor. Instructor's background and personal interests influence to a large degree the success of the endeavor. Another important factor is the fabric of the student body. The academic background of the school and its student population is a force in raising and maintaining interest toward the discipline. Greater issues, such as state and federal policies, foreign policy included, and international events are subtle yet influential factors. Certain trends in the United States' education policies and curricula is another delicate yet powerful force behind the success of the goal to teach class on such a narrow topic. In historical perspective, generational attitude

and peculiarities can support or hinder such endeavors. Last but not least, the active involvement of the responsible Bulgarian authorities is another determining factor. This paper reflects a brief background on Bulgarian studies in the United States and a case study of teaching the Balkans in a midsize university of the U.S. Midwest. Observations and recommendations are included.

Institutional interest: historical overview

A short research on the presence of Bulgarian studies, in general, and related topics (the Balkans, Eastern and Central Europe, the Cold War, Byzantine history, Ottoman history, etc.) in United States academic institutions reveals clustered and sporadic interest. Throughout the decline of the Ottoman Empire, that part of the world has been a clashing point of interest for the Great Powers. By the beginning of the 20th century, Britain managed to establish itself as the leader in the academic exploration of the region. Since 1915, the Centre for South-East European Studies collects and processes vast amount of information on the region. Unfortunately, the destruction brought by World War II slowed down the work of the Centre, and after a brief hiatus in the early 50s, United States scholars took over the information collection from the region. It needs to be noted that from the beginning the interest toward the region has been rather politically driven.

The interest toward the region will remain tainted throughout the Cold War era by political objectives. Several schools in the United States produce scholars who have become authorities in different fields of the Bulgarian history. During the Gorbachev changes of the late 1980s, a short-lived interest surged. However, in the mid 1990's, the surge was followed by programs and departments being closed and interest has shifted to other parts of the world.

At the moment, there are about dozen universities with strong interest toward the region. Princeton, Yale, Stanford, University of Chicago and University of Illinois at Urbana-Champaign are some of the first-tier universities, whereas some of them maintain traditionally strong interest and others have newly developed programs. The University of Illinois at Urbana-Champaign, University of Washington, University of Pittsburgh, University of Wisconsin-Madison, etc. are institutions that benefit by the presence of faculty with strong interest in the region.

The generation of Barbara Jelavic (Indiana University Bloomington), Ivo Banac (Princeton), Hugh Seton-Watson, Peter Sugar, and John Lampe were replaced by Gale Stokes, Sabrina (Pedro) Ramet, Stephen Fisher-Galati, Maria Todorova, etc.

The role of the faculty

The number of junior-faculty openings for positions specializing in the history of foreign regions rose substantially in 2004-5. *The Chronicle*, 2006

According to *the Chronicle of Higher Education*, faculty openings for positions specializing in the history of foreign regions is rising substantially. A closer look (Table 1) reveals that Europe is toward the bottom of the chart by foreign regions, whereas, the necessary distinction between Europe and Eastern Europe is not enforced.

Table 1.

Specialization	Junior-faculty openings in 2004-5	1-year increase
Africa	48	92%
Middle East/Islam	41	64%
World/Non-West	508	28%
Europe	188	25%
Asia	96	19%
North America	257	9%
Latin America	51	4%

SOURCE: American Historical Association

The same research shows that the number of people earning Ph.D.'s in history is falling. It is difficult to estimate if the outcome will be positive or negative. On a more general scale, Caboni and Adisu (2004) claim that "too many teachers are being drawn from the bottom quarter of graduating high school and college students" (p. 166) Such instructors material cannot be expected to have the broad horizons that include remote places and cultures like Bulgaria. In addition, the same research finds that K-12 and postsecondary curriculum is out of alignment (Caboni and Adisu, 2004, p. 174). If the American general educational system is in crisis, then it cannot be expected that Eastern European studies will be of a concern.

The endeavor benefits from the presence of foreign faculty (Myers, 1990, *Immigration*, 2004). Foreign-born faculty from the region and/or faculty with roots in the region are the ones most likely to instigate research and teaching of Bulgarian and/or Balkan history/studies. Simply looking at the names of the faculty often reveals the reason for the interest. Therefore, there is a strong advantage of having faculty from the region and/or with roots from the region. The disadvantage is the clear and present potential of biases.

The fabric of the student body

A dean once told me that when parents asked him how many students attended the college, he would tell them "around 1,700." That was roughly the number they wanted to hear, but the truth of the matter, he confided—for our college as well as for Harvard, Yale, and everywhere else—is probably more like one out of ten. The others fill seats in classrooms and the football stadium, and pay tuition. The last item is especially important because tuition dollars make it possible to pay the utility bills and my salary.

Sanford Pinsker, English Professor.

Sanford Pinsker refers to the Millennium generation, also called the Net Generation, Millennials, Echo Boomers, Google Generation, Power Users, and Generation Y (Power Users, 2006; Wikipedia, 2006). The Millennials are born in or after the year 1982. Notwithstanding the rising number of returning students (Baby Boomers and Generation X), the Millennials are the constituency that faculty needs to consider.

Some characterize the Millennials with "troublingly high levels of academic disengagement" (Baurlein, 2006). Further, by the same description, "the current crop of students is the most educated and affluent ever. Their enrollment rates in college surpass those of their baby-boomer parents and Generation X, and their purchasing power is so strong that it dominates the retail and entertainment sectors" (Baurlein, 2006).

The Millennials most likely do not know the "fall of the wall." The last witness of those events was Generation X. Communism is a fuzzy idea and most likely will not spur vivid interest among the Millennials. Their intellectual zest does not encompass acquisition of data and facts, similarly to the boomer generations; they rely on finding information through "Google"-ing. Consequently, compared to the baby-boomers generation, raising their interest and awareness toward other regions, people and their histories can be a different, if not difficult task.

It is argued that propensity for technology use is in the bottom of their intellectual vacuum.

Jason Frand (2000) lists ten attributes that can be easily ascribed to a Millennial:

- Computers aren't technology... it is an assumed part of life
- The Internet is better than TV
- Reality is no longer real
- Doing is more important than knowing
- Learning more closely resembles Nintendo logic
- Multitasking is a way of life
- Typing is preferred to handwriting

- Staying connected is essential
- There is zero tolerance for delays
- Consumer and creator are blurring

Millennials are defined with their technological agility. (Power Users... 2006). According to a survey, among the three most preferred methods of learning, Millennials favor using online resources. In addition, the survey reveals that the Millennials are not only influencing "*what* is it taught, but *how* it is taught" (Power Users... 2006).

It will be explored below how faculty can apply this knowledge to attract and maintain the Millennials' interest toward histories and cultures of the Balkan region.

One in five of the Millennials in the U.S. has an immigrant parent (Oblinger, 2003). It is hard to impress them or press them, for that fact, with stories from lands far and unknown. On the other hand, by contrast to the increase of foreign-born faculty (Myers, 1990), foreign students' population is on decline (Goodman, 1996). And it is foreign students who spur interest and bring perspective to discussions, particularly about the region (Goodman, 1996; Southwick, 2000).

When fostering a new approach toward teaching Balkan history is that Millennials' learning style is based on "teamwork, experiential activities, structure, and the use of technology" (Oblinger, 2003). For the last two years, the disputes around gaming as a teaching method progressively turns from a disputed trend to mainstream. With the Millennials, or the "Nintendo" generation, gaming is not an alternative, but will be rather the only solution to engage this generation in learning (Prenski; Oblinger, 2003).

The profession rapidly recognizes these trends. Multimedia, interactive and online teaching an American history turns quickly from a fashionable trend to a routine (Oblinger, 2003, p. 44). For almost a decade, the Library of Congress is heavily engaged in making available on the Internet a vast amount of materials related to American history (Library of Congress). The next logical step is sorting out best practices to use the information available in the new formats.

It is obvious that creating a repository for Bulgarian history, similar to the Library of Congress' American legacy, is only the initial stage of enormous, but necessary enterprise to related history materials to the Millennials. The next, probably more difficult, step will be to develop curriculum and teaching practices that can take advantage of those history materials in a way that can engage the Millennials.

Some argue that adapting teaching curriculum and practices to the Millennials' gadgets is one way to go (Oblinger, 2003, p. 44). Faculty needs to find a way to deliver content through their cell phones, laptops, PDAs and other electronic devices.

The tier-division of American educational institution reflects to a great degree

on endeavor such as teaching Bulgarian and any other small-countries' history. The financial abilities of the student body are unquestionably one of the main factor and institutions with affluent body of students are much more likely to have traveled and be willing to travel and learn new cultures then institutions in parochial or less affluent areas. In addition, students in American educational institutions are bombarded by opportunities and exchange programs for study abroad. It is easy to choose an English-speaking foreign country, or with the rapidly raising popularity of Spanish, a South American program, over little-known and obscure Balkan opportunity.

Political climate, social maturity and evolution of educational institutions in the United States

A look at Table 1 shows clearly that the increase of new faculty lines in history is determined by political interests; in this case the American engagement in the Middle East. Moreover, recent revelations about the increase of enrollment in criminal justice major, based on the popularity of a TV show, reveals the how ephemeral an intelligent choice of major in U.S. educational institution might be.

In that sense a glimpse at the available courses reveals attempts to still build on the recent tragic events in Yugoslavia. The 1990s break up of Yugoslavia and the respective consequences, including the United States intervention raised the interest of Americans toward the region, students included. Unfortunately, such interest lasts until the next military conflict that United States becomes involved in and does not help establish firmly and permanently programs and departments that are concerned with the Balkans or any other region for that matter.

The reality of the American academic market: the "umbrella" issue

With its roughly 4200 educational institutions, it would be expected that even subjects of obscure and remote interest as Bulgarian history would find a home institution. And they do. These subjects, however, are part of a larger, "umbrella-like" theme. The "umbrellas" can have different scope: political, historical, linguistic, anthropological/cultural, etc.

E.g., University of Chicago (<http://ceeres.uchicago.edu/>), Boston College (http://www.bc.edu/bc_org/rvp/pubaf/chronicle/v4/N16/BALKAN.html), and the Center for Russian and East European Studies at the University of Michigan (<http://www.umich.edu/~iinet/ceeres/regionalstudies/sees/seesacademics.html>) offers studies on Bulgarian culture, history included as part of the Eastern European and/or Soviet/Russian program. Ottoman and Turkish Studies at Harvard (<http://www.fas.harvard.edu/~turkish/resources.html>) is an example for historical umbrella. As discussed in the paragraph about faculty, the origin and/or interests

of the faculty can bring a large amount of variations. E.g., Gábor Ágoston at Georgetown University

(<http://www.georgetown.edu/departments/history/faculty/agoston.html>)

delivers in conjunction with a Russian professor a Black Sea region history. The good news is that Bulgaria is granted space under the umbrella. The bad news is that the umbrella is too large to let student focus in dept on the Balkans, even less on Bulgaria. Further, a librarian from the and/or with interest about the region, as well as a good collection in the library of the university can spur interest and excel the interest.

Does library interest influence the interest among academics at the university. certainly. how much, is the question

A “salvation” by technology?

Following the discussion about the Millennial generation and their characteristics, the history profession, the instructors of Bulgarian history in particular, need to strongly consider the role of technology. How will history teachers respond to the “information rich history” classroom? Just giving more “stuff” to students might be the last thing they need (Martin et al, 1997). Undoubtedly, the right methodology for technology use in the history classroom is still under debate (Deacon, 1998).

However, the profession also agrees that the technology must be considered and must be considered beyond the communication and word-processing capabilities. (Staley, 2003; Cantu et al, 2003; DenBeste, 2003). Further, digital gap between U.S. history and other histories, including Bulgarian must be closed. Students are expecting to learn other histories the way they learn American history (Bartos, et al, 2005). A starting point in such enormous endeavor can be, as mentioned above, developing a collection on Bulgarian history, similarly to the Library of Congress American heritage.

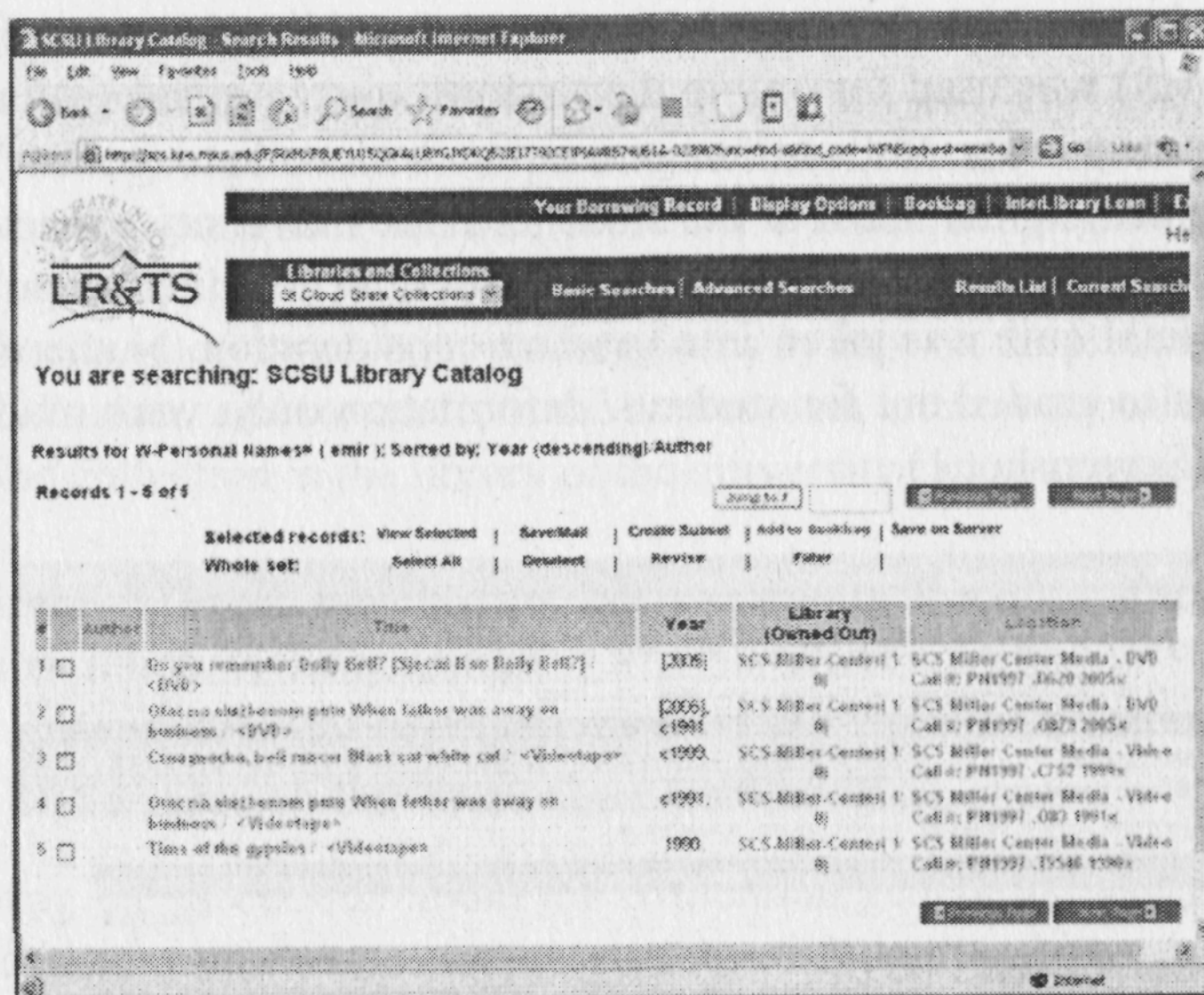
As with the rest of the humanities, it is obvious that technology will not be the panacea for a multitude of problems. Neither will ever technology teach; teachers will. However, weighting carefully when and how to use technology can put a program on a successful track.

Case study: Mid-size University in the U.S. Midwest

An honors class on Balkan geography, history, culture, and ideology/politics was taught in the fall of 2005. Class material is available online

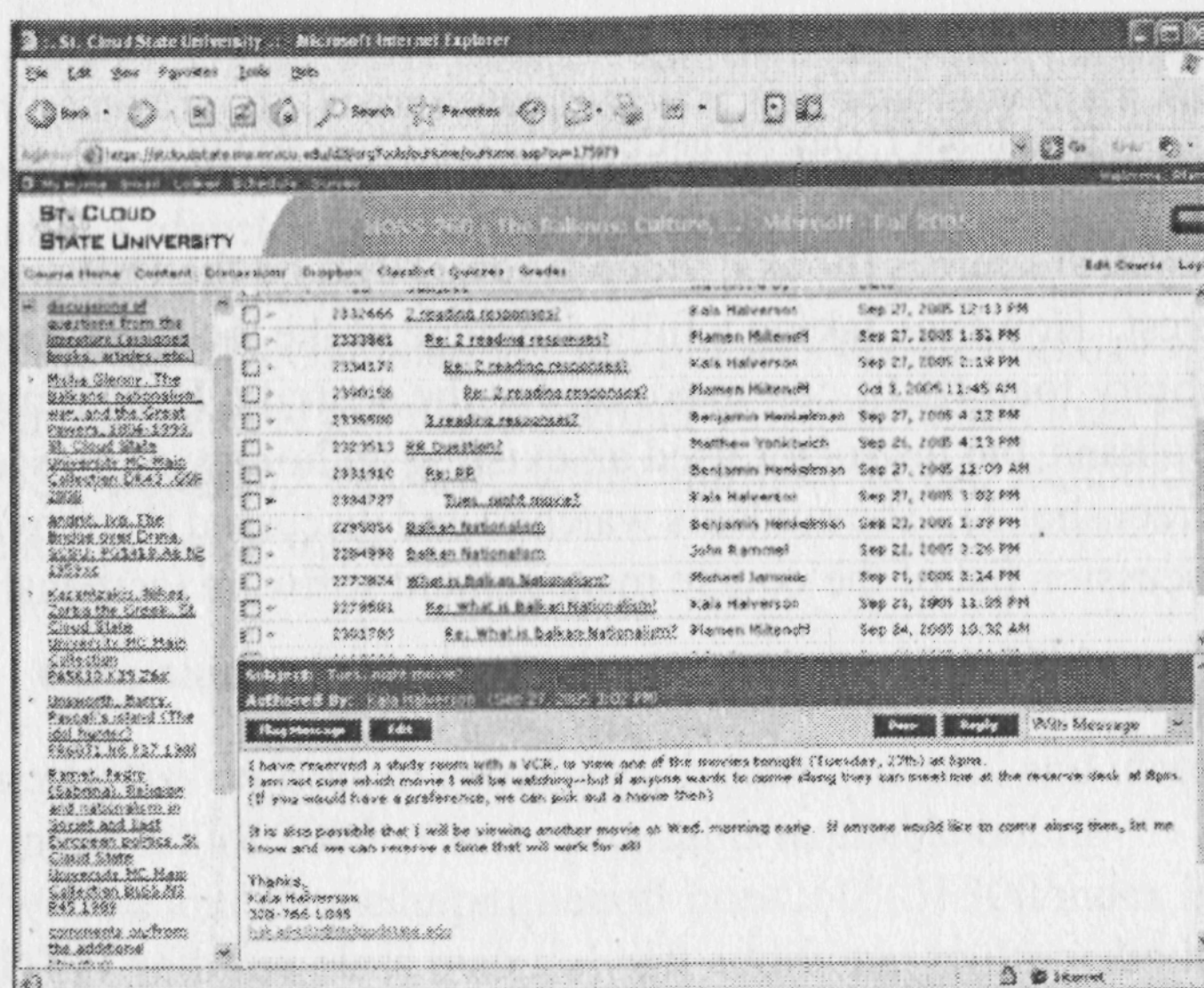
(<http://web.stcloudstate.edu/pmiltlenoff/hons260%5F300/index.html>).

A CD and DVD with the class material and additional multimedia handouts and interactive exercises were made available to the students. The Web site with the



Screenshot 2. Video material available at the local Open Public Automated Catalogue (OPAC)

“Today’s youth have access to the most advanced technology, movie special effects, and video games with which we can never compete. But the good news is that they are not impacted by slick presentations. They don’t want a rehearsed talk, or a manufactured spiel. The more spontaneous and interactive we are in the classroom, the less intimidated, and more open they will be (McCrindel, 2006).

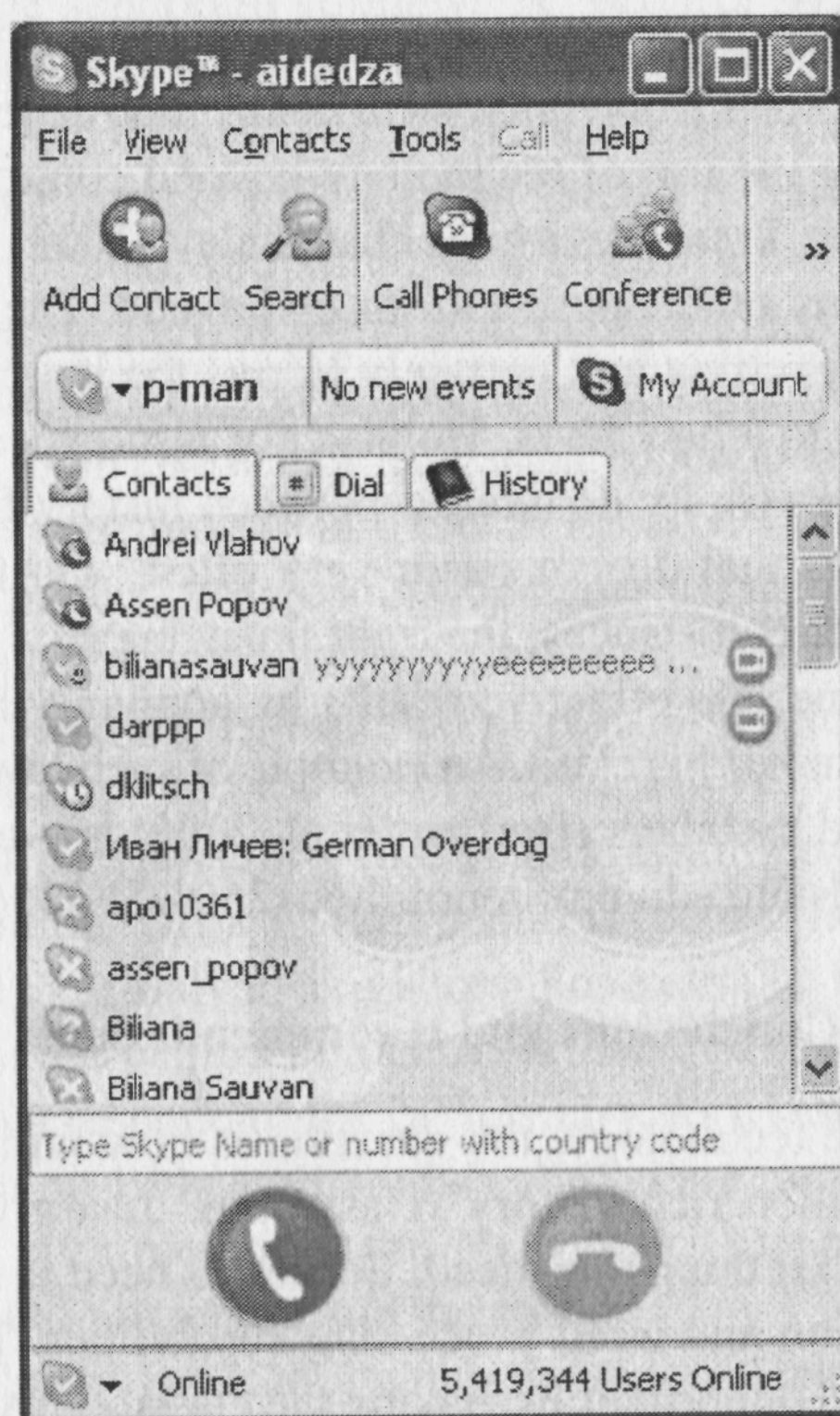


Screenshot 3. Discussion list on the Course Management System

The use of electronic reserve to make available article and chapters of the books can help students read the materials on their own pace. Any means to increase access to the information will increase the chances for the success of the endeavor.

A large amount of information available through the sources from the library and partially through the online databases was juxtaposed to sources freely available on the Internet. For example, facts and processes described in the main reading were conveniently hyperlinked to Internet sources. (http://web.stcloudstate.edu/pmiltanoff/hons260_300/q_movies.html#Glenny). The Millennium generation prefers browsing the Internet, but the exercise offered a great opportunity to also discuss the reliability of Internet sources compared to library sources.

Tested different methods and approaches to rise interest but also to help students learn. As noticed by other historians, an enormous amount of information often made students feel overwhelmed (Martin et al, 1997).



Beyond the issues raised in Martin et al book, computer, more notably, the Internet can be used in innovative yet low-cost ways. Hooking up with students from another country (in this case Bulgaria) is an option offered by a listserv at

St. John. There are certainly numerous more contact lists and options to establish asynchronous or synchronous connection. In this class, the instructor was using a free Internet technology for Voice over Internet Protocol (VoIP) telephony, computer-to-computer connection that allows chat, audio and video conferencing. In addition, the instructor invited international students from the Balkans to visit and lead discussions in the class.

In according to students' evaluations; the two real-time interactions, via Skype with international students, influenced students the most to become involved into the topics. These results are supported by entries from listservs on distance education

Their learning style is based on "teamworks, experiential activities, structure, and the use of technology" (Oblinger, 2003)

It is obvious that the key factor is the human side. The technology can help bridge the gap (if international students from the region are lacking on campus), however, despite the repeated requests of the instructor to the Dean of the History Department of Sofia University for a asynchronous or synchronous contact with history students from Sofia University, such connection failed.

It is time to bring the use of technology beyond communication and word-processing capabilities. It can be argued that Staley (2003) and Cantu and Warren (2003) among many others push too strong beyond. The project described by Cantu et al (2003) is exciting and certainly brings the marriage between history and computer science to a new level. However, it also expects extraordinary circumstances, such as proximity of interest between history faculty and computer science faculty; factors that do not occur very often. On the other side, while waiting for the those circumstances, the right financing etc., a history faculty can achieve low-end, yet no less effective results by applying the Internet and basic computer knowledge in her/his class. An example of such low-end, Internet-based materials, as suggested by others (Bartos, et al, 2005) is available at

<http://web.stcloudstate.edu/pmiltlenoff/hons260%5F300/assignments.html>

Conclusions and recommendations

In the view of the technology, the question is how will history teachers respond to the "information rich history" classroom? Just giving more "stuff" to students might be the last thing they need. Educators need to view technology beyond the communication and word-processing capabilities. They need to look at the low-cost but missed opportunities making the classroom a 21st century experience. The need to combine the "bookish" past with the multimedia and interactive present and future, is evident. Educators need to seriously consider the use DVDs and the Internet to "spice" up the lessons. The need to invite international students from the region to visit the class and "lead" the session are an obvious advantage.

Educators should share prepared modules for Course Management Software on the topic. Learning objects or the "chunk" theory as it is sometimes known, saves time and energy for the faculty and responds better to the demands of the generation "Y" students.

The organizations in Bulgaria, educational, cultural institutions and the government; will need to play a significant role in developing the educational plan. The main question is what is the role and responsibility of the Bulgarian universities and other educational and cultural institutions in advertising Bulgarian history and studies?

Bulgarian educational and cultural institutions work hard to establish and maintain connections with institutions abroad. However, most of the work is sporadic; initiatives commence and die out, often because of lack of financial support. Unfortunately, there is a pronounced misunderstanding that without financial support, such activities are impossible. Volunteer work and activities are still in their infancy and need to be supported strongly. A "reward" system for volunteering and assessing volunteer work and achievements can be a good start to harness such great potential. A databank that contains and maintains connections with foreign institutions that instruct in Bulgarian studies requires a nexus point. This database needs to be created, supported, and heavily advertised. In a 24x7, customer-service culture, the student population expects much more than what there is available at this time, in an effort to spur interest toward Bulgarian history.

Large questions loom. How can Bulgarian educational and cultural institutions support the efforts of faculty in the U.S. to teach and popularize Bulgarian studies, history in particular? Where and when does the institutional responsibility boil down to a personal responsibility (university president, deans, individual faculty, students) and when does institutional responsibility flow over to responsibility of the government?

A certain lack of accountability and general disinterest obstructs a successful, effective cooperation. On a governmental level, the Bulgarian organization certainly falls behind their Balkan neighbors. For example, the Bulgarian national television and radio is far behind in their information dissemination service such as video streaming that respond to the 21st century. As a result, faculty who might be interested in teaching Bulgarian studies abroad are deprived of low-cost and convenient access to information for the students that can build the foundation to a longer commitment to the region and the culture.

"Today's youth have access to the most advanced technology, movie special effects, and video games with which we can never compete. But the good news is that they are not impacted by slick presentations. They don't want a rehearsed talk, or a manufactured spiel. The more spontaneous and interactive we are in the classroom, the less intimidated, and more open they will be (McCrindle, 2000).

Study the Bulgarian Generation "Ys" and compare with the American Gene-

ration "Ys". Compare the Bulgarian students' affinity to Bulgarian history and narrow the topics of interest. Faculty should share the results with the American and other international colleagues.

Thomas Bender, a history professor in New York, is urging the teachers of American history to adopt a more cosmopolitan sense about their trade (Bender, 2006). This is not a new voice. As far back as in 1884 Leonard Kriegel (1984) announced that Reagan's administration was the most hostile administration toward humanities. Since the Reagan era, matters only deteriorated, even if it is clearly shown that the "economic precedence of the United States came from its enormous lead in education" (Goldin and Katz, 2001).

In retrospective, one can conclude that although vigorous work and efforts have been invested, in order to help Bulgarian studies abroad to prosper in the United States and elsewhere, the struggle must continue on both sides. Bender's appeal for change to cosmopolitan attitude can help the Bulgarian studies abroad. The enemy is "us," the teachers of the humanities who have "given up on the great task of transmitting a culture" in favor of offering a curriculum that is "a selfservice cafeteria through which students pass without being nourished" (Kriegel, 1984).

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